

# [Koha 3.4 Manual \(fr\)](#)

**Nicole C. Engard**

ByWater Solutions/BibLibre

Copyright © 2010 Nicole C. Engard/ByWater Solutions/BibLibre/Laurence Lefaucheur

This manual is licensed under the [GNU General Public License, version 2](#) or later

Learn more about this license in the [GPL2 Appendix](#)

---

## Table of Contents

1. [Administration](#)
  - 1.1. [Pratiques globales](#)
    - 1.1.1. [Acquisitions](#)
    - 1.1.2. [Administration](#)
    - 1.1.3. [Authorities](#)
    - 1.1.4. [Cataloging](#)
    - 1.1.5. [Circulation](#)
    - 1.1.6. [Enhanced Content](#)
    - 1.1.7. [I18N/L10N](#)
    - 1.1.8. [Local Use](#)
    - 1.1.9. [Logs](#)
    - 1.1.10. [OPAC](#)
    - 1.1.11. [Patrons](#)
    - 1.1.12. [Searching](#)
    - 1.1.13. [Staff Client](#)
    - 1.1.14. [Web Services](#)
  - 1.2. [Paramètres de base](#)
    - 1.2.1. [Bibliothèques & Groupes](#)
    - 1.2.2. [Types de document et codes de collection](#)
    - 1.2.3. [Valeurs autorisées](#)
  - 1.3. [Adhérents & Circulation](#)
    - 1.3.1. [Catégories adhérent](#)
    - 1.3.2. [Villes et communes](#)
    - 1.3.3. [Types de voies](#)
    - 1.3.4. [Attributs adhérent](#)
    - 1.3.5. [Règles de prêt et d'amendes](#)
    - 1.3.6. [Limitation de transfert entre bibliothèques](#)
    - 1.3.7. [Alertes de circulation](#)
  - 1.4. [Catalogue](#)
    - 1.4.1. [Grilles de catalogage MARC](#)
    - 1.4.2. [Liens Koha => MARC](#)
    - 1.4.3. [Liens intitulés => MARC](#)
    - 1.4.4. [Validation grilles de catalogage](#)
    - 1.4.5. [Types d'autorité](#)
    - 1.4.6. [Sources de classification](#)
    - 1.4.7. [Règles de concordance](#)
  - 1.5. [Acquisitions](#)
    - 1.5.1. [Devises et taux de change](#)
    - 1.5.2. [Budgets, périodes budgétaires, planning](#)
    - 1.5.3. [Budget racine](#)
  - 1.6. [Paramètres divers](#)
    - 1.6.1. [Mots vides](#)
    - 1.6.2. [Serveurs Z39.50](#)

- 2. [Outils](#)
- 2.1. [Nouvelles](#)
- 2.2. [Créateur d'Étiquettes](#)
- 2.3. [Créateur rapide d'Étiquette de couverture](#)
- 2.4. [Patron Card Creator](#)
- 2.5. [Calendrier](#)
- 2.5.1. [Ajouter des Événements](#)
- 2.5.2. [Modifier des fermetures](#)
- 2.5.3. [Aide additionnelle](#)
- 2.6. [Commentaires](#)
- 2.7. [Tag Moderation](#)
- 2.8. [Profils CVS](#)
- 2.8.1. [Ajouter des profils CSV](#)
- 2.8.2. [Modifier les profils CSV](#)
- 2.8.3. [Utiliser les profils CSV](#)
- 2.9. [Rotating Collections](#)
- 2.10. [Préparation des notices MARC à l'import](#)
- 2.11. [Gestion des notices MARC traitées](#)
- 2.12. [Exportation notices biblio et exemplaires](#)
- 2.13. [Importation des données adhérents](#)
- 2.13.1. [Créer le fichier adhérents](#)
- 2.13.2. [Importer les adhérents](#)
- 2.14. [Adhérents \(rendre anonyme et supprimer\)](#)
- 2.15. [Chargement de photos d'adhérents](#)
- 2.16. [Planificateur de tâches](#)
- 2.16.1. [Résolution de problèmes](#)
- 2.17. [Messages](#)
- 2.17.1. [Ajouter des messages](#)
- 2.17.2. [Messages existants](#)
- 2.18. [Déclencheur de notification](#)
- 2.19. [Visualiseur des logs](#)
- 2.20. [Inventaire / Recolement](#)
- 2.21. [Modifier un lot d'exemplaires](#)
- 2.22. [Supprimer un lot d'exemplaires](#)
- 3. [Adhérents](#)
- 3.1. [Ajouter un nouvel adhérent](#)
- 3.2. [Ajouter un adhérent professionnel de la bibliothèque](#)
- 3.3. [Ajouter un adhérent Statistiques](#)
- 3.4. [Modifier les adhérents](#)
- 3.5. [Permissions adhérent](#)
- 3.5.1. [Définir les Permissions Adhérent](#)
- 3.5.2. [Détail des permissions adhérent](#)
- 3.6. [Patron Information](#)
- 3.6.1. [Check Out](#)
- 3.6.2. [Details](#)
- 3.6.3. [Fines](#)
- 3.6.4. [Circulation History](#)
- 3.6.5. [Modification Log](#)
- 3.6.6. [Messaging](#)
- 3.6.7. [Notices](#)
- 3.7. [Patron Search](#)
- 4. [Circulation](#)
- 4.1. [Check Out \(Issuing\)](#)
- 4.1.1. [Checking Items Out](#)
- 4.1.2. [Check Out Messages](#)
- 4.2. [Check Out Warnings](#)

- 4.3. [Check In \(Returning\)](#)
- 4.3.1. [Checking Items In](#)
- 4.3.2. [Check In Messages](#)
- 4.4. [Circulation Messages](#)
- 4.4.1. [Setting up Messages](#)
- 4.4.2. [Adding a Message](#)
- 4.4.3. [Viewing Messages](#)
- 4.5. [Holds](#)
- 4.5.1. [Placing Holds in Staff Client](#)
- 4.5.2. [Managing Holds](#)
- 4.5.3. [Receiving Holds](#)
- 4.6. [Transfers](#)
- 4.7. [Set Library](#)
- 4.8. [Fast Add Cataloging](#)
- 4.9. [Circulation Reports](#)
- 4.9.1. [Holds Queue](#)
- 4.9.2. [Holds to pull](#)
- 4.9.3. [Holds awaiting pickup](#)
- 4.9.4. [Hold ratios](#)
- 4.9.5. [Transfers to receive](#)
- 4.9.6. [Overdues](#)
- 4.9.7. [Overdues with fines](#)
- 4.10. [Tracking Inhouse Use](#)
- 4.11. [In Processing / Book Cart Locations](#)
- 4.12. [Self Checkout](#)
- 4.13. [Offline Circulation Utility](#)
- 4.13.1. [Firefox Plugin](#)
- 4.13.2. [Offline Circ Tool for Windows](#)
- 4.13.3. [Upload Offline Circ File](#)
- 5. [Cataloging](#)
- 5.1. [Bibliographic Records](#)
- 5.1.1. [Adding Records](#)
- 5.1.2. [Editing Records](#)
- 5.1.3. [Duplicating Records](#)
- 5.2. [Item Records](#)
- 5.2.1. [Adding Items](#)
- 5.2.2. [Editing Items](#)
- 5.2.3. [Moving Items](#)
- 5.3. [Authorities](#)
- 6. [Serials](#)
- 6.1. [Add a subscription](#)
- 6.2. [Receive Issues](#)
- 6.3. [Create a Routing List](#)
- 6.4. [Subscriptions in Staff Client](#)
- 6.5. [Subscriptions in OPAC](#)
- 7. [Acquisitions](#)
- 7.1. [Setup](#)
- 7.2. [Vendors](#)
- 7.2.1. [Add a Vendor](#)
- 7.2.2. [View/Edit a Vendor](#)
- 7.2.3. [Vendor Contracts](#)
- 7.3. [Managing Suggestions](#)
- 7.4. [Placing Orders](#)
- 7.4.1. [Create a basket](#)
- 7.4.2. [Create a basket group](#)
- 7.4.3. [Printing baskets](#)

- 7.5. [Receiving Orders](#)
- 7.6. [Claims & Late Orders](#)
- 7.7. [Acquisition Searches](#)
- 8. [Lists & Cart](#)
  - 8.1. [Lists](#)
    - 8.1.1. [Create a List](#)
    - 8.1.2. [Add to a List](#)
    - 8.1.3. [Viewing Lists](#)
  - 8.2. [Cart](#)
- 9. [Reports](#)
  - 9.1. [Custom Reports](#)
    - 9.1.1. [Add Custom Report](#)
    - 9.1.2. [Edit Custom Reports](#)
  - 9.2. [Statistics Reports](#)
    - 9.2.1. [Acquisitions Statistics](#)
    - 9.2.2. [Patron Statistics](#)
    - 9.2.3. [Catalog Statistics](#)
    - 9.2.4. [Circulation Statistics](#)
    - 9.2.5. [Serials Statistics](#)
    - 9.2.6. [Patrons with the most checkouts](#)
    - 9.2.7. [Most Circulated Items](#)
    - 9.2.8. [Patrons with no checkouts](#)
    - 9.2.9. [Items with no checkouts](#)
    - 9.2.10. [Catalog by Item Type](#)
    - 9.2.11. [Lost Items](#)
    - 9.2.12. [Average Loan Time](#)
  - 9.3. [Report Dictionary](#)
- 10. [OPAC](#)
  - 10.1. [Search Results](#)
    - 10.1.1. [Results Overview](#)
    - 10.1.2. [Filters](#)
    - 10.1.3. [Search RSS Feeds](#)
  - 10.2. [Bibliographic Record](#)
  - 10.3. [Lists & Cart](#)
    - 10.3.1. [Lists](#)
    - 10.3.2. [Cart](#)
  - 10.4. [Enhanced Content](#)
    - 10.4.1. [Tagging](#)
    - 10.4.2. [Comments](#)
    - 10.4.3. [Zotero](#)
    - 10.4.4. [Custom RSS Feeds](#)
  - 10.5. [My Account](#)
- 11. [Searching](#)
  - 11.1. [Advanced Search Prefixes](#)
  - 11.2. [Guide to Searching](#)
    - 11.2.1. [Indexing and Searching Description](#)
    - 11.2.2. [Indexing Configuration](#)
    - 11.2.3. [Basic Searching](#)
    - 11.2.4. [Advanced Searching](#)
    - 11.2.5. [Common Command Language Searching](#)
  - 11.3. [Koha Search Indexes](#)
- 12. [About Koha](#)
  - 12.1. [Server Information](#)
  - 12.2. [Perl Modules](#)
- 13. [SOPAC2 Installation](#)
  - 13.1. [Introduction](#)

- 13.2. [Installation of Locum and Insurge](#)
- 13.2.1. [Dependencies](#)
- 13.2.2. [Download](#)
- 13.2.3. [Creation of the Database](#)
- 13.2.4. [Sync DSN](#)
- 13.2.5. [Installation of Insurge](#)
- 13.2.6. [Installation of Locum](#)
- 13.3. [Installation of Koha Connector](#)
- 13.4. [Harvest Records](#)
- 13.5. [Installation of Sphinx](#)
- 13.5.1. [Dependencies](#)
- 13.5.2. [Download and Compile](#)
- 13.5.3. [Creation of User and Group](#)
- 13.5.4. [The demon Sphinx](#)
- 13.5.5. [Configuration](#)
- 13.5.6. [Indexing documents](#)
- 13.6. [Installation of SOPAC2](#)
- 13.6.1. [Download](#)
- 13.6.2. [Installation](#)
- 13.6.3. [Configuration](#)
- A. [System Preference Defaults](#)
- A.1. [ISBD Defaults](#)
- A.1.1. [MARC Default](#)
- A.1.2. [UNIMARC Default](#)
- A.2. [NoZebraIndexes Default](#)
- B. [Implementation Checklist](#)
- B.1. [Data Migration](#)
- B.2. [Admin Configuration](#)
- B.3. [Localization Configuration](#)
- B.4. [Circulation Configuration](#)
- B.5. [Patron Configuration](#)
- B.6. [Cataloging Configuration](#)
- B.7. [Authorities Configuration](#)
- B.8. [Searchng Configuration](#)
- B.9. [OPAC Configuration](#)
- B.10. [Enhanded Content Configuration](#)
- B.11. [Acquisitions Configuration](#)
- B.12. [Serials Configuration](#)
- B.13. [Planning for Go-Live](#)
- C. [Handling On Order items and holds](#)
- D. [Configuring Receipt Printers](#)
- D.1. [For Epson TM-T88III \(3\) & TM-T88IV \(4\) Printers](#)
- D.1.1. [In the Print Driver](#)
- D.1.2. [In Firefox](#)
- D.2. [For Epson TM-T88II \(2\) Printers](#)
- D.2.1. [In Firefox](#)
- E. [Sample Notice](#)
- F. [Using Koha as a Content Management System \(CMS\)](#)
- F.1. [Setup](#)
- F.1.1. [Troubleshooting](#)
- F.1.2. [Bonus Points](#)
- F.2. [Usage](#)
- F.2.1. [Adding Pages](#)
- F.2.2. [Viewing your page](#)
- F.2.3. [Example](#)
- F.2.4. [Live Examples](#)

- G. [Resetting the Koha Database](#)
  - G.1. [Truncate Tables](#)
  - G.2. [Reset the Zebra Index](#)
  - H. [Important Links](#)
  - H.1. [Koha Related](#)
  - H.2. [Cataloging Related](#)
  - H.3. [Enhanced Content Related](#)
  - H.4. [Reports Related](#)
  - H.5. [Installation Guides](#)
  - H.6. [Misc](#)
  - I. [Koha Embedded Holdings Data](#)
  - J. [FAQs](#)
  - J.1. [Display](#)
  - J.1.1. [Custom Item Type/Authorized Value Icons](#)
  - J.2. [Circulation](#)
  - J.2.1. [Dropbox Date](#)
  - J.2.2. [Duplicate Overdue Notices](#)
  - J.3. [Cataloging](#)
  - J.3.1. [Authority Fields](#)
  - J.4. [Reports](#)
  - J.4.1. [Define Codes Stored in DB](#)
  - J.5. [Enhanced Content](#)
  - J.5.1. [FRBRizing Content](#)
  - J.6. [System Administration](#)
  - J.6.1. [Errors in Zebra Cron](#)
  - J.6.2. [Making Z39.50 Target Public](#)
  - J.6.3. [Shelving Location Authorized Values](#)
  - J.6.4. [Why do I need Authorized Values?](#)
  - J.7. [Hardware](#)
  - J.7.1. [Barcode Scanners](#)
  - J.7.2. [Printers](#)
  - K. [Cron Jobs](#)
  - K.1. [Cron Jobs](#)
  - K.1.1. [Search](#)
  - K.1.2. [Fines](#)
  - K.1.3. [Circulation](#)
  - K.1.4. [Notices](#)
  - K.1.5. [In Processing/Book Cart](#)
  - K.1.6. [Catalog](#)
  - K.1.7. [OPAC](#)
  - K.1.8. [Deprecated scripts](#)
  - K.2. [Additional Information](#)
  - L. [Using the SRU server](#)
  - L.1. [Using the SRU server](#)
  - L.1.1. [Explain](#)
  - L.1.2. [Search](#)
  - L.1.3. [Retrieve](#)
  - M. [GNU General Public License version 3](#)
- List of Tables**
- 11-1. [Attributes](#)
  - 11-2. [Indexes](#)
  - I-1. [Koha Embedded Holdings Data](#)

---

## Chapter 1. Administration

## [1.1. Preferences syst me globales](#)

Les preferences syst me globales contr lent la fa on dont koha fonctionne en g n ral. D finissez ces preferences avant tout le reste dans Koha.

Lorsque vous  ditez les preferences, une mention '(modifi )' appara t   c t  du param tre que vous avez chang  jusqu'  ce que vous cliquiez le bouton 'Enregistrer tout':

---

### [1.1.1. Acquisitions](#)

---

#### [1.1.1.1. RenewSerialAddsSuggestion](#)

Valeur par d faut : Don't add

Asks: \_\_\_ a suggestion for a biblio when its attached serial is renewed.

Valeurs :

Add

Don't add

---

### [1.1.2. Administration](#)

These preferences are general settings for your system.

---

#### [1.1.2.1. Interface options](#)

These preference are related to your Koha interface

---

##### [1.1.2.1.1. DebugLevel](#)

Valeur par d faut : lots of

Asks: Show \_\_\_ debugging information in the browser when an internal error occurs.

Valeurs :

lots of - will show as much information as possible

no - will only show basic error messages

some - will show only some of the information available

---

##### [1.1.2.1.2. delimiter](#)

This preference determines how reports exported from Koha will separate data.

Valeur par d faut : semicolons

Asks: Separate columns in an exported report file with \_\_\_ by default.

Valeurs :

#'s

backslashes

commas

semicolons

slashes

---

#### [1.1.2.1.3. KohaAdminEmailAddress](#)

This is the default From: address for emails unless there is one for the particular branch, and is referred to when an internal error occurs.

Asks: Use \_\_\_ as the email address for the administrator of Koha.

---

#### [1.1.2.1.4. noltemTypelimages](#)

Valeur par défaut : Show

Asks: \_\_\_ itemtype icons in the catalog.

Valeurs :

Shows

Don't show

---

#### [1.1.2.1.5. virtualshelves](#)

Valeur par défaut : Allow

Asks: \_\_\_ staff and patrons to create and view saved lists of books.

Valeurs :

Allow

Don't Allow

---

#### [1.1.2.2. Login options](#)

These preferences are related to logging into your Koha system

---

##### [1.1.2.2.1. AutoLocation](#)

Valeur par défaut : Don't require

Asks: \_\_\_ staff to log in from a computer in the IP address range specified by their library (if any).

Set IP address range in the library administration area

*Get there:* More > Administration > Basic Parameters > [Libraries & Groups](#)

Valeurs :

Don't require

Require

---

##### [1.1.2.2.2. IndependantBranches](#)

Valeur par défaut : Don't prevent

Asks: \_\_\_ staff (but not superlibrarians) from modifying objects (holds, items, patrons, etc.) belonging to other libraries.

Valeurs :

Don't prevent

Prevent

---

#### [1.1.2.2.3. insecure](#)

Valeur par défaut : Don't allow

Asks: \_\_\_ staff to access the staff client without logging in.

Valeurs :

Allow

Don't allow

Enabling this is dangerous, and should not be done in production environments.

---

#### [1.1.2.2.4. SessionStorage](#)

Valeur par défaut : in the MySQL database

Asks: Store login session information \_\_\_

Valeurs :

as temporary files

in the MySQL database

in the PostgreSQL database

PostgreSQL is not yet supported.

---

#### [1.1.2.2.5. timeout](#)

Valeur par défaut : 12000000

Asks: Automatically log out users after \_\_\_ seconds of inactivity.

---

### [1.1.3. Authorities](#)

---

#### [1.1.3.1. BiblioAddsAuthorities](#)

Valeur par défaut : allow

Asks: When editing records, \_\_\_ them too automatically create new authority records if needed, rather than having to reference existing authorities.

Valeurs :

allow

This setting allows you to type values in the fields controlled by authorities and then adds a new authority if one does not exist

don't allow

This setting will lock the authority controlled fields, forcing you to search for an authority versus allowing you to type the information in yourself.

---

#### [1.1.3.2. dontmerge](#)

Valeur par défaut : Don't

Asks: \_\_\_ automatically update attached biblios when changing an authority record.

Valeurs :

Do

Don't

If this is set to not merge you will need to ask your administrator to enable the merge\_authorities.pl cronjob.

---

#### [1.1.4. Cataloging](#)

---

##### [1.1.4.1. Display](#)

---

###### [1.1.4.1.1. authoritysep](#)

Valeur par défaut : --

Asks: Separate multiple displayed authors, series or subjects with \_\_\_\_.

---

###### [1.1.4.1.2. hide\\_marc](#)

Valeur par défaut : Display

Asks: \_\_\_\_ MARC tag numbers, subfield codes and indicators in MARC views.

Valeurs :

Display -- shows the tag numbers on the cataloging interface

Don't display -- shows just descriptive text when cataloging

---

###### [1.1.4.1.3. IntranetBiblioDefaultView](#)

Valeur par défaut : ISBD form

Asks: By default, display biblio records in \_\_\_\_

Valeurs :

ISBD form -- displays records in the staff client in the old card catalog format

MARC form -- displays records in the staff client in MARC

normal form -- visual display in the staff client (for the average person)

---

###### [1.1.4.1.4. ISBD](#)

Valeur par défaut : [MARC21 Default Appendix](#) or [UNIMARC Default Appendix](#)

Asks: Use the following as the ISBD template:

Allows you to customize ISBD view for your system.

---

###### [1.1.4.1.5. LabelMARCView](#)

Valeur par défaut : Don't

Asks: \_\_\_\_ collapse repeated tags of the same type into one tag entry.

Valeurs :

Do -- will combine all identical tag numbers under one heading in the MARC view in the OPAC and Staff Client

Don't -- will list all of the tags individually in the MARC view in the OPAC and Staff Client

---

#### [1.1.4.1.6. OPACSerialIssueDisplayCount](#)

Valeur par défaut : 3

Asks: Show the \_\_\_ previous issues of a serial on the OPAC.

---

#### [1.1.4.1.7. OpacSuppression](#)

Valeur par défaut : Don't hide

Asks: \_\_\_ items marked as suppressed from OPAC search results.

Valeurs :

Don't hide -- will show items in OPAC search results if they are marked suppressed

Hide -- will not show items in OPAC search results if they're marked as suppressed

Each bib record with items you want to hide from the OPAC simply need to have the 942n field set to 1. The index then hides it from display in OPAC but will still display it in the Staff Client

If this preference is set to 'hide' and you have the 942n field set to 1, it will hide the entire bib record - not just an individual item.

You must have the Suppress index set up in Zebra and at least one suppressed item, or your searches will be broken.

---

#### [1.1.4.1.8. StaffSerialIssueDisplayCount](#)

Valeur par défaut : 3

Asks: Show the \_\_\_ previous issues of a serial on the staff client.

---

#### [1.1.4.1.9. SubscriptionHistory](#)

Valeur par défaut : a full list

Asks: When showing the subscription information for a biblio, show \_\_\_ of the serial issues.

Valeurs :

a full list

a summary

---

#### [1.1.4.1.10. URLLinkText](#)

Valeur par défaut : Online Resource

Asks: Show \_\_\_ as the text of links embedded in MARC records.

This value will show in place of the URL for data entered in the 856\$u field if no other label is defined in the 856 filed.

---

#### [1.1.4.2. Interface](#)

##### [1.1.4.2.1. advancedMARCeditor](#)

Valeur par défaut : Don't display

Asks: \_\_\_ descriptions of fields and subfields in the MARC editor.

Valeurs :

Display

Don't display

---

#### [1.1.4.2.2. DefaultClassificationSource](#)

Valeur par défaut : Dewey Decimal System

Asks: Use \_\_\_ as the default classification source.

Valeurs :

- ANSCR (Sound Recordings)
  - Dewey Decimal Classification
  - Library of Congress Classification
  - Other/Generic Classification Scheme
  - SuDoc Classification (U.S. GPO)
  - Universal Decimal Classification
- 

#### [1.1.4.3. Record Structure](#)

---

##### [1.1.4.3.1. autoBarcode](#)

Valeur par défaut : generated in the form <branchcode>yymm0001

Asks: Barcodes are \_\_\_

Valeurs :

- generated in the form <branchcode>yymm0001
  - generated in the form <year>-0001
  - <year>-0002. generated in the form 1, 2, 3
  - not generated automatically
- 

##### [1.1.4.3.2. item-level itypes](#)

Valeur par défaut : specific item

Asks: Use the item type of the \_\_\_ as the authoritative item type (for determining circulation and fines rules, etc).

Valeurs :

- biblio record
  - specific item
- 

##### [1.1.4.3.3. itemcallnumber](#)

Valeur par défaut : 082ab

Asks: Map the MARC subfield to an item's callnumber.

This can contain multiple subfields to look in; for instance 082ab would look in 082 subfields a and b.

Examples: Dewey: 082ab or 092ab; LOC: 050ab or 090ab; from the item record: 852hi

---

##### [1.1.4.3.4. marcflavour](#)

Valeur par défaut : MARC21

Asks: Interpret and store MARC records in the \_\_\_ format.

Valeurs :

MARC21

UNIMARC

---

#### [1.1.4.3.5. MARCOrgCode](#)

Valeur par défaut : OST

Asks: Fill in the MARC organization code \_\_\_ by default in new MARC records (leave blank to disable).

Learn More: [MARC Code list for Organizations](#)

---

#### [1.1.4.3.6. z3950NormalizeAuthor & z3950AuthorAuthFields](#)

Defaults: Don't copy & 701,702,700

Asks: \_\_\_ authors from the UNIMARC \_\_\_ tags (separated by commas) to the correct author tags when importing a record using Z39.50.

Values for z3950NormalizeAuthor:

Copy

Don't copy

---

#### [1.1.4.4. Spine Labels](#)

---

##### [1.1.4.4.1. SpineLabelAutoPrint](#)

Valeur par défaut : don't

Asks: When using the quick spine label printer, \_\_\_ automatically pop up a print dialog.

Valeurs :

do

don't

---

##### [1.1.4.4.2. SpineLabelFormat](#)

Valeur par défaut : <itemcallnumber><copynumber>

Asks: Include the following fields on a quick-printed spine label: (Enter in columns from the biblio, biblioitems or items tables, surrounded by < and >.)

---

#### [1.1.5. Circulation](#)

---

##### [1.1.5.1. Checkout Policy](#)

---

###### [1.1.5.1.1. AllowNotForLoanOverride](#)

Valeur par défaut : Allow

Asks: \_\_\_ staff to override and check out items that are marked as not for loan.

Valeurs :

Allow

Don't allow

---

#### [1.1.5.1.2. AllowRenewalLimitOverride](#)

Valeur par défaut : Allow

Asks: \_\_\_ staff to manually override the renewal limit and renew a checkout when it would go over the renewal limit.

Valeurs :

Allow

Don't allow

---

#### [1.1.5.1.3. AutomaticItemReturn](#)

Valeur par défaut : Do

Asks: \_\_\_ automatically transfer items to their home branch when they are returned.

Valeurs :

Do

Don't

---

#### [1.1.5.1.4. ceilingDueDate](#)

Valeur par défaut : no value

Asks: Make all checkouts due on or before \_\_\_

Enter the date to match the format you set in your localization preferences (iso = YYYY-MM-DD or metric = MM/DD/YYYY)

*Get there:* More > Administration > Global system preferences > I18N/L10N > [dateformat](#)

---

#### [1.1.5.1.5. CircControl](#)

Valeur par défaut : the library the item is from

Asks: Use the checkout and fines rules of \_\_\_

Valeurs :

the library the item is from

the library the patron is from

the library you are logged in at

---

#### [1.1.5.1.6. globalDueDate](#)

Valeur par défaut : no value

Asks: Make all checkouts have a due date of \_\_\_

Enter the date to match the format you set in your localization preferences (iso = YYYY-MM-DD or metric = MM/DD/YYYY)

*Get there:* More > Administration > Global system preferences > I18N/L10N > [dateformat](#)

---

#### [1.1.5.1.7. HomeOrHoldingBranch](#)

Valeur par défaut : the library the item was checked out from

Asks: Use the checkout and fines rules of \_\_\_

Valeurs :

the library the item is from

the library the item was checked out from

It is not recommend that this setting be changed after initial setup of Koha

This preference does nothing unless the `IndependentBranches` preference is turned ON.

*Get there:* More > Administration > Global System Preferences > Admin > [IndependentBranches](#)

---

#### [1.1.5.1.8. InProcessingToShelvingCart](#)

Valeur par défaut : Don't move

Asks: \_\_\_ items that have the location PROC to the location CART when they are checked in.

Valeurs :

Don't move

Move

---

#### [1.1.5.1.9. IssuingInProcess](#)

Valeur par défaut : Don't prevent

Asks: \_\_\_ patrons from checking out an item whose rental charge would take them over the limit.

Valeurs :

Don't prevent

Prevent

Example: Your library has a \$5 limit set for 'fines' (ie, after incurring \$5 in fines, a patron can no longer check out items). A patron comes to the desk with 5 items to check out (4 books and a video) The patron has \$4 in charges already on their account. One of the videos has a rental charge of \$1, therefore making the total fines on the patron's account suddenly \$5 (the limit).

---

#### [1.1.5.1.10. maxoutstanding](#)

Valeur par défaut : 5

Asks: Prevent patrons from making holds on the OPAC if they owe more than \_\_\_ USD in fines.

---

#### [1.1.5.1.11. NewItemsDefaultLocation](#)

Asks: When items are created, give them the temporary location of \_\_\_ (should be a location code, or blank to disable).

---

#### [1.1.5.1.12. noissuescharge](#)

Valeur par défaut : 5

Asks: Prevent patrons from checking out books if they have more than \_\_\_ USD in fines.

---

#### [1.1.5.1.13. RenewalPeriodBase](#)

Valeur par défaut : the old due date of the checkout

Asks: When renewing checkouts, base the new due date on \_\_\_

Valeurs :

the old due date of the checkout

the current date

---

#### [1.1.5.1.14. ReturnBeforeExpiry](#)

Valeur par défaut : Don't require

Asks: \_\_\_ patrons to return books before their accounts expire (by restricting due dates to before the patron's expiration date).

Valeurs :

Don't require

Require

---

#### [1.1.5.1.15. ReturnToShelvingCart](#)

Valeur par défaut : Don't move

Asks: \_\_\_ all items to the location CART when they are checked in.

Valeurs :

Don't move

Move

---

#### [1.1.5.1.16. TransfersMaxDaysWarning](#)

Valeur par défaut : 3

Asks: Show a warning on the "Transfers to Recieve" screen if the transfer has not been received \_\_\_ days after it is sent.

---

#### [1.1.5.1.17. UseBranchTransferLimits & BranchTransferLimitsType](#)

Defaults: Don't enforce & collection code

Asks: \_\_\_ branch transfer limits based on \_\_\_

UseBranchTransferLimits Valeurs :

Don't enforce

Enforce

BranchTransferLimitsType Valeurs :

collection code

item type

---

#### [1.1.5.1.18. useDaysMode](#)

Valeur par défaut : Don't include

Asks: \_\_\_ days when the library is closed when calculating due dates.

Valeurs :

Don't include

Include

---

### [1.1.5.2. Fines Policy](#)

---

#### [1.1.5.2.1. finesCalendar](#)

Valeur par défaut : not including the days the library is closed

Asks: Calculate fines based on days overdue \_\_\_\_

Valeurs :

directly

not including the days the library is closed

---

#### [1.1.5.2.2. finesMode](#)

Valeur par défaut : Calculate (but only for mailing to the admin)

Asks: \_\_\_\_ fines

Valeurs :

Calculate (but only for mailing to the admin)

Calculate and charge

Don't calculate

Requires that you have the fines cron job running (misc/cronjobs/fines.pl)

---

### [1.1.5.3. Holds Policy](#)

---

#### [1.1.5.3.1. AllowHoldDateInFuture](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ hold requests to be placed that do not enter the waiting list until a certain future date.

Valeurs :

Allow

Don't allow

---

#### [1.1.5.3.2. AllowHoldsOnDamagedItems](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ hold requests to be placed on damaged items.

Valeurs :

Allow

Don't allow

---

#### [1.1.5.3.3. AllowHoldPolicyOverride](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ staff to override hold policies when placing holds.

Valeurs :

Allow

Don't allow

---

#### [1.1.5.3.4. AllowOnShelfHolds](#)

Valeur par défaut : Allow

Asks: \_\_\_ hold requests to be placed on items that are not checked out.

Valeurs :

Allow

Don't Allow

---

#### [1.1.5.3.5. canreservefromotherbranches](#)

Valeur par défaut : Allow

Asks: \_\_\_ a user from one library to place a hold on an item from another library

Valeurs :

Allow

Don't allow (with [independant branches](#))

---

#### [1.1.5.3.6. maxreserves](#)

Valeur par défaut : 50

Asks: Patrons can only have \_\_\_ holds at once.

---

#### [1.1.5.3.7. OPACAllowHoldDateInFuture](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to place holds that don't enter the waiting list until a certain future date.

Valeurs :

Allow

[AllowHoldDateInFuture](#) must also be enabled for this to work

Don't allow

---

#### [1.1.5.3.8. ReservesNeedReturns](#)

Valeur par défaut : Don't automatically

Asks: \_\_\_ mark holds as found and waiting when a hold is placed specifically on them and they are already checked in.

Valeurs :

Automatically

Don't automatically

---

#### [1.1.5.3.9. StaticHoldsQueueWeight & RandomizeHoldsQueueWeight](#)

Defaults: 0 & in that order

Asks: Satisfy holds from the libraries \_\_\_\_ (as branchcodes, separated by commas; if empty, uses all libraries) \_\_\_\_

RandomizeHoldsQueueWeight Valeurs :

in random order

in that order

---

#### [1.1.5.4. Interface](#)

---

##### [1.1.5.4.1. AllowAllMessageDeletion](#)

Valeur par défaut : Don't allow

Asks: \_\_\_\_ staff to delete messages added from other libraries.

Valeurs :

Allow

Don't allow

---

##### [1.1.5.4.2. CircAutocompl](#)

Valeur par défaut : Try

Asks: \_\_\_\_ to automatically fill in the member when entering a patron search on the circulation screen.

Valeurs :

Don't try

Try

---

##### [1.1.5.4.3. FilterBeforeOverdueReport & DisplayClearScreenButton](#)

FilterBeforeOverdueReport Valeur par défaut : Don't require

DisplayClearScreenButton Valeur par défaut : Show

Asks: \_\_\_\_ staff to choose which checkouts to show before running the overdues report. \_\_\_\_ a button to clear the current patron from the screen on the circulation screen.

FilterBeforeOverdueReport Valeurs :

Don't require

Require

DisplayClearScreenButton Valeurs :

Don't show

Show

---

##### [1.1.5.4.4. itemBarcodeInputFilter](#)

Valeur par défaut : Don't filter

Asks: \_\_\_\_ scanned patron barcodes.

Valeurs :

Convert from CueCat format

Don't filter

Remove spaces from

Remove the first number from T-prefix style

---

#### [1.1.5.4.5. numReturnedItemsToShow](#)

Valeur par défaut : 20

Asks : Show the \_\_\_ last returned items on the checkin screen.

---

#### [1.1.5.4.6. previousIssuesDefaultSortOrder](#)

Valeur par défaut : earliest to latest

Asks: Sort previous checkouts on the circulation page from \_\_\_ due date.

Valeurs :

earliest to latest

latest to earliest

---

#### [1.1.5.4.7. ReservesMaxPickUpDelay](#)

Valeur par défaut : 7

Asks: Mark a hold as problematic if it has been waiting for more than \_\_\_ days.

---

#### [1.1.5.4.8. SpecifyDueDate](#)

Valeur par défaut : Allow

Asks: \_\_\_ staff to specify a due date for a checkout.

Due dates are calculated using your circulation and fines rules, but staff can override that if you allow them to specify a due date at checkout.

Valeurs :

Allow

Don't allow

---

#### [1.1.5.4.9. todaysIssuesDefaultSortOrder](#)

Valeur par défaut : latest to earliest

Asks: Sort today's checkouts on the circulation page from \_\_\_ due date.

Valeurs :

earliest to latest

latest to earliest

---

#### [1.1.5.5. Self Checkout](#)

---

#### [1.1.5.5.1. ShowPatronImageInWebBasedSelfCheck](#)

Valeur par défaut : Don't show

Asks \_\_\_ the patron's picture (if one has been added) when they use the web-based self checkout.

Valeurs :

Don't show

Show

---

#### [1.1.6. Enhanced Content](#)

Always read the terms of service associated with external data sources to be sure that you are using the products within the allowed limits.  
If you have more than one source of cover images set up, Koha will use the first available.

---

##### [1.1.6.1. All](#)

---

###### [1.1.6.1.1. FRBRizeEditions](#)

Valeur par défaut : Don't show

Asks: \_\_\_ other editions of an item on the staff client

Valeurs :

Don't show

Show

This preference pulls all editions of the same title available in your collection regardless of material type. Items will appear under an 'Editions' tab on the detail page for the title in question.

Requires that you turn on one or more of the ISBN services (ThingISBN, XISBN, PinesISBN)

---

###### [1.1.6.1.2. OPACFRBRizeEditions](#)

Valeur par défaut : Don't show

Asks: \_\_\_ other editions of an item on the OPAC.

Valeurs :

Don't show

Show

This preference pulls all editions of the same title available in your collection regardless of material type. Items will appear under an 'Editions' tab on the detail page for the title in question.

Requires that you turn on one or more of the ISBN services (ThingISBN, XISBN, PinesISBN)

---

##### [1.1.6.2. Amazon](#)

---

###### [1.1.6.2.1. AmazonEnabled](#)

Valeur par défaut : Don't use

Asks: \_\_\_ data from Amazon on the staff interface (including reviews and "Search Inside" links on item detail pages).

Valeurs :

Don't use

Use

This requires that you have signed up for and entered an access key.

Sign up at: <http://aws.amazon.com/>

Set your enter your key in the AWSAccessKeyID system preference

*Get there:* More > Administration > Global system preferences > Enhanced Content > Amazon > [AWSAccessKeyID](#)

---

#### **[1.1.6.2.2. OPACAmazonEnabled](#)**

Valeur par défaut : Don't use

Asks: \_\_\_ data from Amazon on the OPAC (including reviews and "Search Inside" links on item detail pages).

Valeurs :

Don't use

Use

This requires that you have signed up for and entered an access key.

Sign up at: <http://aws.amazon.com/>

Set your enter your key in the AWSAccessKeyID system preference

*Get there:* More > Administration > Global system preferences > Enhanced Content > Amazon > [AWSAccessKeyID](#)

---

#### **[1.1.6.2.3. AmazonLocale](#)**

Valeur par défaut : American

Asks: Use Amazon data from its \_\_\_ website.

Value:

American

British

Canadian

French

German

Japanese

---

#### **[1.1.6.2.4. AWSAccessKeyID](#)**

Asks: Access Amazon content using the access key \_\_\_

Sign up at: <http://aws.amazon.com/>

---

#### **[1.1.6.2.5. AmazonAssocTag](#)**

Asks: Put the associate tag \_\_\_ on links to Amazon.

This can net your library referral fees if a patron decides to buy an item after clicking through to Amazon from your site.

Sign up at: <http://aws.amazon.com/>

---

#### **[1.1.6.2.6. AmazonCoverImages](#)**

Valeur par défaut : Don't show

Asks: \_\_\_ cover images from Amazon on search results and item detail pages on the staff interface.

Valeurs :

Don't show

Show

Requires that [AmazonEnabled](#) is set to 'Use'

---

#### **1.1.6.2.7. AmazonReviews**

Valeur par défaut : Don't show

Asks: \_\_\_ reviews from Amazon on item detail pages on the staff interface.

Valeurs :

Don't show

Show

Requires that [AmazonEnabled](#) is set to 'Use'

---

#### **1.1.6.2.8. AmazonSimilarItems**

Valeur par défaut : Don't show

Asks: \_\_\_ similar items, as determined by Amazon, on item detail pages on the staff interface.

Valeurs :

Don't show

Show

This will use Amazon data to determine if you have similar items in your collection - it will not show items that you do not already have cataloged at your library.

Requires that [AmazonEnabled](#) is set to 'Use'

---

#### **1.1.6.2.9. OPACAmazonCoverImages**

Valeur par défaut : Don't show

Asks: \_\_\_ cover images from Amazon on search results and item detail pages on the OPAC.

Valeurs :

Don't show

Show

Requires that [OPACAmazonEnabled](#) is set to 'Use'

---

#### **1.1.6.2.10. OPACAmazonSimilarItems**

Valeur par défaut : Don't show

Asks: \_\_\_ similar items, as determined by Amazon, on item detail pages on the OPAC.

Valeurs :

Don't show

Show

This will use Amazon data to determine if you have similar items in your collection - it will not show items that you do not already have cataloged at your library.

Requires that [OPACAmazonEnabled](#) is set to 'Use'

---

#### **1.1.6.2.11. OPACAmazonReviews**

Valeur par défaut : Don't show

Asks: \_\_\_ reviews from Amazon on item detail pages on the OPAC.

Valeurs :

Don't show

Show

Requires that [OPACAmazonEnabled](#) is set to 'Use'

---

#### **1.1.6.3. Babeltheque**

##### **1.1.6.3.1. Babeltheque**

Valeur par défaut : Don't

Asks: \_\_\_ include information (such as reviews and citations) from Babeltheque in item detail pages on the OPAC.

Valeurs :

Do

Don't

---

#### **1.1.6.4. Baker & Taylor**

This is a pay service, you must contact Baker & Taylor to subscribe to this service before setting these options.

---

##### **1.1.6.4.1. BakerTaylorEnabled**

Valeur par défaut : Don't add

Asks: \_\_\_ Baker and Taylor links and cover images to the OPAC and staff client. This requires that you have entered in a username and password (which can be seen in image links).

Valeurs :

Add

Don't add

To use this you will need to also set the [BakerTaylorUsername & BakerTaylorPassword](#) system preferences

---

##### **1.1.6.4.2. BakerTaylorBookstoreURL**

Asks: Baker and Taylor "My Library Bookstore" links should be accessed at https:// \_\_\_ isbn

This should be filled in with something like ocls.mylibrarybookstore.com/MLB/actions/searchHandler.do?nextPage=bookDetails&parentNum=10923&key=

Leave it blank to disable these links.

Be sure to get this information from Baker & Taylor when subscribing.

---

##### **1.1.6.4.3. BakerTaylorUsername & BakerTaylorPassword**

Asks: Access Baker and Taylor using username \_\_\_ and password \_\_\_

#### [1.1.6.5. Google](#)

---

##### [1.1.6.5.1. GoogleJackets](#)

Valeur par défaut : Don't add

Asks: \_\_\_ cover images from Google Books to search results and item detail pages on the OPAC.

Valeurs :

Add

Don't add

---

##### [1.1.6.6. LibraryThing](#)

LibraryThing for Libraries is a pay service. You must first contact LibraryThing directly for pricing and subscription information. Learn more at <http://www.librarything.com/forlibraries>

---

##### [1.1.6.6.1. ThingISBN](#)

Valeur par défaut : Don't use

Asks: \_\_\_ the ThingISBN service to show other editions of a title

Valeurs :

Don't use

Use

Requires [FRBRizeEditions](#) and/or [OPACFRBRizeEditions](#) set to 'show'

This is separate from Library Thing for Libraries and does not have a cost associated with it.

---

##### [1.1.6.6.2. LibraryThingForLibrariesEnabled](#)

Deault: Don't show

Asks: \_\_\_ reviews, similar items, and tags from Library Thing for Libraries on item detail pages on the OPAC.

Valeurs :

Don't show

Show

If this is set to 'show' you will need to enter a value in the '[LibraryThingForLibrariesID](#)' system preference.

---

##### [1.1.6.6.3. LibraryThingForLibrariesID](#)

Asks: Access Library Thing for Libraries using the customer ID \_\_\_

This value is provided to you when you sign up for LibraryThing for Libraries.

---

##### [1.1.6.6.4. LibraryThingForLibrariesTabbedView](#)

Valeur par défaut : in line with bibliographic information

Asks: Show Library Thing for Libraries content \_\_\_

Valeurs :

in line with bibliographic information

in tabs

---

### [1.1.6.7. OCLC](#)

---

#### [1.1.6.7.1. XISBN](#)

Valeur par défaut : Don't use

Asks: \_\_\_ the OCLC xISBN service to show other editions of a title

Valeurs :

Don't use

Use

Requires [FRBRizeEditions](#) and/or [OPACFRBRizeEditions](#) set to 'show'

---

#### [1.1.6.7.2. OCLCAffiliateID](#)

Asks: Use the OCLC affiliate ID \_\_\_ to access the xISBN service.

Unless you have signed up for an ID with OCLC, you are limited to 500 requests per day. Available at:

<http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp>

---

#### [1.1.6.7.3. XISBDailyLimit](#)

Valeur par défaut : 499

Asks: Only use the xISBN service \_\_\_ times a day.

Unless you have signed up for an ID with OCLC, you are limited to 500 requests per day. Available at:

<http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp>

---

### [1.1.6.8. Syndetics](#)

Syndetics is a pay service. You must first contact Syndetics directly for pricing and subscription information.

---

#### [1.1.6.8.1. SyndeticsEnabled](#)

Valeur par défaut : Don't use

Asks: \_\_\_ content from Syndetics.

Valeurs :

Don't use

Use

Requires that you enter your [SyndeticsClientCode](#) before this content will appear.

---

#### [1.1.6.8.2. SyndeticsClientCode](#)

Asks: Use the client code \_\_\_ to access Syndetics.

You will need to get your client code directly from Syndetics.

---

#### [1.1.6.8.3. SyndeticsCoverImages & SyndeticsCoverImageSize](#)

SyndeticsCoverImages Valeur par défaut : Don't show

SyndeticsCoverImageSize Valeur par défaut : medium

Asks: \_\_\_ cover images from Syndetics on search results and item detail pages on the OPAC in a \_\_\_ size.

SyndeticsCoverImages Valeurs :

Don't show

Show

SyndeticsCoverImageSize Valeurs :

medium

large

---

#### [1.1.6.8.4. SyndeticsAuthorNotes](#)

Valeur par défaut : Don't show

Asks: \_\_\_ notes about the author of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.6.8.5. SyndeticsAwards](#)

Valeur par défaut : Don't show

Asks: \_\_\_ information from Syndetics about the awards a title has won on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.6.8.6. SyndeticsEditions](#)

Valeur par défaut : Don't show

Asks: \_\_\_ information about other editions of a title from Syndetics on item detail pages on the OPAC

Valeurs :

Don't show

Show

Requires [OPACFRBRizeEditions](#) set to 'show'

---

#### [1.1.6.8.7. SyndeticsExcerpt](#)

Valeur par défaut : Don't show

Asks: \_\_\_ excerpts from of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.6.8.8. SyndeticsReviews](#)

Valeur par défaut : Don't show

Asks: \_\_\_ reviews of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.6.8.9. SyndeticsSeries](#)

Valeur par défaut : Don't show

Asks: \_\_\_ information on other books in a title's series from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.6.8.10. SyndeticsSummary](#)

Valeur par défaut : Don't show

Asks: \_\_\_ a summary of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.6.8.11. SyndeticsTOC](#)

Valeur par défaut : Don't show

Asks: \_\_\_ the table of contents of a title from Syndetics on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.6.9. Tagging](#)

##### [1.1.6.9.1. TagsEnabled](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons and staff to put tags on items.

Valeurs :

Allow

Don't allow

---

#### [1.1.6.9.2. TagsModeration](#)

Valeur par défaut : Don't require

Asks: \_\_\_ that tags submitted by patrons be reviewed by a staff member before being shown.

Valeurs :

Don't require

Require

When moderation is required all tags go through the tag moderation tool before becoming visible.

*Get there:* More > Tools > [Tags](#)

---

#### [1.1.6.9.3. TagsShowOnList](#)

Valeur par défaut : 6

Asks: Show \_\_\_ tags on search results on the OPAC.

Set the value to 0 (zero) to turn this feature off.

---

#### [1.1.6.9.4. TagsInputOnList](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to input tags on search results on the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.6.9.5. TagsShowOnDetail](#)

Valeur par défaut : 10

Asks: Show \_\_\_ tags on item detail pages on the OPAC.

Set the value to 0 (zero) to turn this feature off.

---

#### [1.1.6.9.6. TagsInputOnDetail](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to input tags on item detail pages on the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.6.9.7. TagsExternalDictionary](#)

Asks: Allow tags in the dictionary of the ispell executable \_\_\_ on the server to be approved without moderation.

Enter the path on your server to a local ispell executable, used to set \$Lingua::IsPELL::path.

An example would be /usr/bin/ispell

---

## [1.1.7. I18N/L10N](#)

---

### [1.1.7.1. dateformat](#)

Valeur par défaut : mm/dd/yyyy

Asks: Format dates like \_\_\_\_

Valeurs :

dd/mm/yyyy

mm/dd/yyyy

yyyy/mm/dd

---

### [1.1.7.2. opaclanguesdisplay](#)

Valeur par défaut : Don't allow

Asks: \_\_\_\_ patrons to change the language they see on the OPAC.

Valeurs :

Allow

Don't allow

---

## [1.1.8. Local Use](#)

---

### [1.1.9. Logs](#)

Logs keep track of transaction on the system. You can decide which actions you want to log and which you don't using these preferences.

---

#### [1.1.9.1. BorrowersLog](#)

Valeur par défaut : Log

Asks: \_\_\_\_ changes to patron records.

Valeurs :

Don't log

Log

---

#### [1.1.9.2. CataloguingLog](#)

Valeur par défaut : Don't log

Asks: \_\_\_\_ any changes to bibliographic or item records.

Valeurs :

Don't log

Log

Since this occurs whenever a book is cataloged, edited, or checked in or out it can be very resource intensive - slowing down your system.

---

#### [1.1.9.3. FinesLog](#)

Valeur par défaut : Log

Asks: \_\_\_ when overdue fines are charged or automatically forgiven.

Valeurs :

Don't log

Log

---

#### [1.1.9.4. IssueLog](#)

Valeur par défaut : Log

Asks: \_\_\_ when items are checked out.

Valeurs :

Don't log

Log

---

#### [1.1.9.5. LetterLog](#)

Valeur par défaut : Log

Asks: \_\_\_ when an automatic claim notice is sent.

Valeurs :

Don't log

Log

This log tracks all notices that go to patrons including the overdue notices.

---

#### [1.1.9.6. ReturnLog](#)

Valeur par défaut : Log

Asks: \_\_\_ when items are returned.

Valeurs :

Don't log

Log

---

#### [1.1.9.7. SubscriptionLog](#)

Valeur par défaut : Log

Asks: \_\_\_ when serials are added, deleted or changed.

Valeurs :

Don't log

Log

---

#### [1.1.10. OPAC](#)

---

##### [1.1.10.1. Appearance](#)

These preferences control how things appear in the OPAC.

---

#### [1.1.10.1.1. AuthorisedValueImages](#)

Valeur par défaut : Don't show

Asks: \_\_\_ images for authorized values (such as lost statuses and locations) in search results and item detail pages on the OPAC.

Valeurs :

Don't show

Show

Get there: More > Administration > [Authorized Values](#)

---

#### [1.1.10.1.2. BiblioDefaultView](#)

Valeur par défaut : don't

Asks: When patrons click on a link to another website from your OPAC (like Amazon or OCLC), \_\_\_ open the website in a new window.

Valeurs :

Do

Don't

#### [1.1.10.1.3. DisplayOPACiconsXSLT](#)

Valeur par défaut : Don't show

Asks: On pages displayed with XSLT stylesheets on the OPAC, \_\_\_ icons for itemtype and authorized values.

Valeurs :

Don't show

Show

#### [1.1.10.1.4. hidelostitems](#)

Valeur par défaut : Don't show

Asks: \_\_\_ lost items on search and detail pages.

Valeurs :

Don't show

Show

#### [1.1.10.1.5. LibraryName](#)

Asks: Show \_\_\_ as the name of the library on the OPAC.

This value will appear in the title bar of the browser

Edit 'opacheader' if you'd like to add a library name above your search box on the OPAC

---

#### [1.1.10.1.6. OPACBaseURL](#)

Asks: The OPAC is located at http:// \_\_\_

This must be filled in correctly for RSS, unAPI, and search plugins to work.  
This must be filled in to show 'OPAC View' links from bib records in the staff client:

---

#### [1.1.10.1.7. opaccolorstylesheet](#)

Valeur par défaut : colors.css

Asks: Include the additional CSS stylesheet /css/ \_\_\_ on all pages in the OPAC

Leave this field blank to disable it

---

#### [1.1.10.1.8. opaccredits](#)

Asks: Include the following HTML in the footer of all pages in the OPAC:

Click the 'Click to edit; link to enter HTML to appear at the bottom of every page in the OPAC

---

#### [1.1.10.1.9. OPACDisplayRequestPriority](#)

Valeur par défaut : Don't

Asks: \_\_\_ patrons the priority level of their holds in the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.10.1.10. opacheader](#)

Asks: Include the following HTML in the header of all pages in the OPAC

This value will appear above the main content of your page  
Edit '[LibraryName](#)' if you'd like to edit the contents of the <title> tag

---

#### [1.1.10.1.11. OpacHighlightedWords](#)

Valeur par défaut : Don't highlight

Asks: \_\_\_ words the patron searched for in their search results.

Valeurs :

Don't highlight

Highlight

---

#### [1.1.10.1.12. opaclangues](#)

Valeur par défaut : English

Asks: Enable the following languages on the OPAC

Valeurs :

English

---

To install additional languages you need to run misc/translation/install-code.pl. For example, to install French you would run the following command *install-code.pl fr-FR* to make the templates, once they exist and are in the right place then they will show up as an option in this preference.

---

#### [1.1.10.1.13. opaclanguesdisplay](#)

Valeur par défaut : Don't allow

Asks: \_\_\_ patrons to select their language on the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.10.1.14. opaclayoutstylesheet](#)

Valeur par défaut : opac.css

Asks: Use the CSS stylesheet /css/ \_\_\_ on all pages in the OPAC, instead of the default

Leave this field blank to disable it

---

#### [1.1.10.1.15. OpacMaintenance](#)

Valeur par défaut : Don't show

Asks: \_\_\_

Valeurs :

Don't show

Show

---

#### [1.1.10.1.16. OpacMainUserBlock](#)

Valeur par défaut : Welcome to Koha... <hr>

Asks: Show the following HTML in its own column on the main page of the OPAC

HTML entered in this field will appear in the center of the main page of your OPAC

---

#### [1.1.10.1.17. OpacNav](#)

Valeur par défaut : Important links here.

Asks: Show the following HTML on the left hand column of all pages on the OPAC (generally navigation links)

---

#### [1.1.10.1.18. OPACSearchForTitleIn](#)

Valeur par défaut : <li><a href="http://worldcat.org/search?q={TITLE}" target="\_blank">Other Libraries (WorldCat)</a></li> <li><a href="http://www.scholar.google.com/scholar?q={TITLE}" target="\_blank">Other Databases (Google Scholar)</a></li> <li><a href="http://www.bookfinder.com/search/?author={AUTHOR}&title={TITLE}&st=xl&ac=qr" target="\_blank">Online Stores (Bookfinder.com)</a></li>

Asks: Include a "More Searches" box on the detail pages of items on the OPAC, with the following HTML (leave blank to disable)

The placeholders {TITLE}, {ISBN} and {AUTHOR} will be replaced with information from the displayed record.

---

#### [1.1.10.1.19. OPACShowCheckoutName](#)

Valeur par défaut : Don't show

Asks: \_\_\_ the name of the patron that has an item checked out on item detail pages on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.10.1.20. opacsmallimage](#)

Asks: Use the image at \_\_\_\_ in the OPAC header, instead of the Koha logo. If this image is a different size than the Koha logo, you will need to customize the CSS.

This should be a complete URL, starting with http://

---

#### [1.1.10.1.21. opacstylesheet](#)

Asks: Use the remote CSS stylesheet /css/ \_\_\_\_ on all pages in the OPAC, instead of the default.

This should be a complete URL, starting with http://

---

#### [1.1.10.1.22. opacthemes](#)

Valeur par défaut : prog

Asks: Use the \_\_\_\_ theme on the OPAC.

Valeurs :

prog

---

#### [1.1.10.1.23. OPACURLOpenInNewWindow](#)

Valeur par défaut : don't

Asks: When patrons click on a link to another website from your OPAC (like Amazon or OCLC), \_\_\_\_ open the website in a new window.

Valeurs :

do

don't

---

#### [1.1.10.1.24. OPACUserCSS](#)

Asks: Include the following CSS on all pages in the OPAC

---

#### [1.1.10.1.25. opacuserjs](#)

Asks: Include the following JavaScript on all pages in the OPAC

---

#### [1.1.10.1.26. XSLTDetailsDisplay](#)

Valeur par défaut : normally

Asks: Show item details pages on the OPAC \_\_\_\_

Valeurs :

normally

using XSLT stylesheets

XSLT stylesheets enable more detail to be displayed on the detail pages in the OPAC

---

### [1.1.10.2. Features](#)

---

#### [1.1.10.2.1. OpacAuthorities](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to search your authority records.

Valeurs :

Allow

A link to Browse by Subject will appear at the top of your OPAC

Don't allow

---

#### [1.1.10.2.2. opacbookbag](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to store items in a temporary "Cart" on the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.10.2.3. OPACFinesTab](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to access the Fines tab on the My Account page on the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.10.2.4. OpacPasswordChange](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to change their own password on the OPAC.

Valeurs :

Allow

Don't allow

Enabling this will break LDAP authentication.

---

#### [1.1.10.2.5. OPACPatronDetails](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to notify the library of changes to their contact information from the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.10.2.6. opacreadinghistory](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to see what books they have checked out in the past.

Enabling this will make it so that patrons can view their circulation history in the OPAC.  
This data is stored in the system regardless of your choice.

---

#### [1.1.10.2.7. OPACShelfBrowser](#)

Valeur par défaut : Show

Asks: \_\_\_ a shelf browser on item details pages, allowing patrons to see what's near that item on the shelf.

Valeurs :

Don't show

Show

This uses up a fairly large amount of resources on your server, and should be avoided if your collection has a large number of items.

---

#### [1.1.10.2.8. OpacTopissue](#)

Valeur par défaut : Don't allow

Asks: \_\_\_ patrons to access a list of the most checked out items on the OPAC.

Valeurs :

Allow

A link to Most Popular will appear at the top of your OPAC

Don't allow

This is somewhat experimental, and should be avoided if your collection has a large number of items.

---

#### [1.1.10.2.9. opacuserlogin](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to log in to their accounts on the OPAC.

Valeurs :

Allow

Don't allow

The OPAC will still be searchable if patrons can't log in, this just disables the patron account access via the OPAC

---

#### [1.1.10.2.10. RequestOnOpac](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to place holds on items from the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.10.2.11. reviewson](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to make comments on items on the OPAC.

Valeurs :

Allow

Patrons comments/reviews all require moderation before they appear in the OPAC

Don't allow

---

#### [1.1.10.2.12. suggestion](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to make purchase suggestions on the OPAC.

Valeurs :

Allow

Don't allow

---

#### [1.1.10.3. Policy](#)

##### [1.1.10.3.1. AnonSuggestions](#)

Valeur par défaut : Don't allow

Asks: \_\_\_ patrons that aren't logged in to make purchase suggestions.

Valeurs :

Allow

Don't allow

---

##### [1.1.10.3.2. OPACFineNoRenewals](#)

Valeur par défaut : 99999

Asks: Only allow patrons to renew their own books on the OPAC if they have less than \_\_\_ USD in fines

Leave this field blank to disable

---

##### [1.1.10.3.3. OPACItemHolds](#)

Valeur par défaut : Allow

Asks: \_\_\_ patrons to place holds on specific items in the OPAC.

Valeurs :

Allow

Patrons can place holds on specific items as well as the next available item.

Don't allow

If this is disabled, users can only put a hold on the next available item.

---

#### [1.1.10.3.4. OpacRenewalAllowed](#)

Valeur par défaut : Don't allow

Asks: \_\_\_ patrons to renew their own books on the OPAC.

Valeurs :

Allow

Don't allow

Staff will still be able to renew items for patrons via the staf client

---

#### [1.1.10.3.5. OPACViewOthersSuggestions](#)

Valeur par défaut : Don't show

Asks: \_\_\_ purchase suggestions from other patrons on the OPAC.

Valeurs :

Don't show

Show

---

#### [1.1.10.3.6. SearchMyLibraryFirst](#)

Valeur par défaut : Don't limit

Asks: \_\_\_ patrons' searches to the library they are registered at.

Valeurs :

Don't limit

Searching the OPAC will show results from all libraries

Limit

Patrons will still be able to search other libraries via the Advanced search page - but will be limited to searches for their library only from the basic search box

---

#### [1.1.10.3.7. singleBranchMode](#)

Valeur par défaut : Don't allow

Asks: \_\_\_ patrons to select their branch on the OPAC.

Valeurs :

Allow

Don't allow

---

### [1.1.11. Patrons](#)

---

#### [1.1.11.1. AddPatronLists](#)

Valeur par défaut : specific categories

Asks: List \_\_\_ under the new patron menu.

Valeurs :

general patron types

specific categories

---

#### [1.1.11.2. AutoEmailOpacUser & AutoEmailPrimaryAddress](#)

AutoEmailOpacUser Valeur par défaut : Don't send

AutoEmailPrimaryAddress Valeur par défaut : alternate

Asks: \_\_\_ an email to newly created patrons with their account details at their \_\_\_ email address.

AutoEmailOpacUser Valeurs :

Don't send

Send

AutoEmailPrimaryAddress Valeurs :

alternate

first valid

home

work

---

#### [1.1.11.3. autoMemberNum](#)

Valeur par défaut : Do

Asks: \_\_\_ default the card number field on the patron addition screen to the next available card number

Valeurs :

Do

If the largest currently used card number is 26345000012941, then this field will default to 26345000012942 for the next patron

Don't

---

#### [1.1.11.4. BorrowerMandatoryField](#)

Valeur par défaut : surname|cardnumber|barcode

Asks: The following database columns must be filled in on the patron entry screen \_\_\_

Separate columns with |

For help with field names, ask your system administrator or view the database structure associated with the borrowers table.

---

#### [1.1.11.5. borrowerRelationship](#)

Valeur par défaut : father|mother

Asks: Guarantors can be the following of those they guarantee \_\_\_

Input multiple choices separated by |

---

#### [1.1.11.6. BorrowersTitles](#)

Valeur par défaut : Mr|Mrs|Miss|Ms

Asks: Borrowers can have the following titles \_\_\_\_

Input multiple choices separated by |

---

#### [1.1.11.7. checkdigit](#)

Valeur par défaut : Don't

Asks: \_\_\_\_ check and construct borrower card numbers in the Katipo style.

Valeurs :

Do

Don't

This overrides autoMemberNum if on.

---

#### [1.1.11.8. EnhancedMessagingPreferences](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ patrons to choose which notices they receive and when they receive them.

Valeurs :

Allow

Don't allow

This only applies to certain kinds of notices, overdue notices will be sent based on the library's rules, not the patron's choice.

---

#### [1.1.11.9. ExtendedPatronAttributes](#)

Valeur par défaut : Enable

Asks: \_\_\_\_ searching, editing and display of custom attributes on patrons.

Valeurs :

Don't enable

Enable

Use custom attributes for fields that the default patron record does not support such as driver's license number or student ID number.

---

#### [1.1.11.10. intranetreadinghistory](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ staff to access a patron's checkout history

Valeurs :

Allow

Don't allow

This data is stored in the system regardless of your choice.

---

#### [1.1.11.11. MaxFine](#)

Valeur par défaut : 9999

Asks: The late fine for a specific checkout will only go up to \_\_\_\_ USD.



---

### [1.1.11.18. uppercasesurnames](#)

Valeur par défaut : Don't

Asks: \_\_\_ store and display surnames (last names) in upper case.

Valeurs :

Do

Don't

---

### [1.1.12. Searching](#)

---

#### [1.1.12.1. Features](#)

---

##### [1.1.12.1.1. NoZebra](#)

Valeur par défaut : Use

Asks: \_\_\_ the Zebra search engine. Searches are very slow on even modest sized collections when Zebra is off.

Valeurs :

Don't use

Use

---

##### [1.1.12.1.2. NoZebraIndexes](#)

Valeur par défaut : [See Appendix A - Section 2](#)

---

##### [1.1.12.1.3. OpacGroupResults](#)

Valeur par défaut : Don't use

Asks: \_\_\_ PazPar2 to group similar results on the OPAC.

Valeurs :

Don't use

Use

This requires that [PazPar2](#) is set up and running.

---

##### [1.1.12.1.4. QueryAutoTruncate](#)

Valeur par défaut : automatically

Asks: Perform wildcard searching (where, for example, Har would match Harry and harp) \_\_\_ (The \* character would be used like so: Har\* or \*logging.)

Valeurs :

automatically

only if \* is added

---

##### [1.1.12.1.5. QueryFuzzy](#)

Valeur par défaut : Try

Asks: \_\_\_ to match similarly spelled words in a search (for example, a search for flang would also match flange and fang)

Valeurs :

Don't try

Try

Requires that NoZebra is set to 'Use'

*Get there:* More > Administration > Global System Preferences > Cataloging > [NoZebra](#)

---

#### [1.1.12.1.6. QueryRemoveStopwords](#)

Valeur par défaut : Don't remove

Asks: \_\_\_ stopwords specified in Koha from searches.

Valeurs :

Don't remove

If [NoZebra](#) is set to 'Use' leave this preference set to 'Don't remove'

Remove

Requires that you have updated your Koha stopwords list

*Get there:* More > Administration > Stop Words

Requires that NoZebra is set to 'Don't use'

Zebra, on its own, handles a few of the most common stopwords

---

#### [1.1.12.1.7. QueryStemming](#)

Valeur par défaut : Try

Asks: \_\_\_ to match words of the same base in a search

Valeurs :

Don't try

Try

A search for enabling would also match enable and enabled

Requires that NoZebra is set to 'Use'

*Get there:* More > Administration > Global System Preferences > Cataloging > [NoZebra](#)

---

#### [1.1.12.1.8. QueryWeightFields](#)

Valeur par défaut : Enable

Asks: \_\_\_ ranking of search results by relevance

Valeurs :

Disable

Enable

Requires that NoZebra is set to 'Use'

*Get there:* More > Administration > Global System Preferences > Cataloging > [NoZebra](#)

---

### [1.1.12.2. Results Display](#)

---

#### [1.1.12.2.1. defaultSortField & defaultSortOrder](#)

defaultSortField Valeur par défaut : author

defaultSortOrder Valeur par défaut : ascending

Asks: By default, sort search results in the staff client by \_\_\_\_, \_\_\_\_

defaultSortField Valeurs :

- author
- call number
- date added
- date of publication
- relevance
- title
- total number of checkouts

defaultSortOrder Valeurs :

- ascending
- descending
- from A to Z
- from Z to A

---

#### [1.1.12.2.2. numSearchResults](#)

Valeur par défaut : 20

Asks: By default, show \_\_\_\_ results per page in the staff client.

---

#### [1.1.12.2.3. OPACdefaultSortField](#)

Valeur par défaut : ascending

Asks: By default, sort search results in the OPAC by \_\_\_\_

Valeurs :

- ascending
- author
- call number
- date added
- date of publication
- descending
- from A to Z
- from Z to A
- relevance

title

total number of checkouts

---

#### [1.1.12.2.4. OPACItemsResultsDisplay](#)

Valeur par défaut : 20

Asks: By default, show \_\_\_ results per page in the OPAC.

---

#### [1.1.12.2.5. OPACNumSearchResults](#)

Valeur par défaut : Don't show

Asks: \_\_\_ an item's branch, location and call number in OPAC search results.

Valeurs :

Don't show

Show

---

#### [1.1.12.2.6. XSLTResultsDisplay](#)

Valeur par défaut : using XSLT stylesheets

Asks: Show search results \_\_\_

Valeurs :

normally

using XSLT stylesheets

XSLT stylesheets enable more detail to be displayed on the search results in the OPAC

---

#### [1.1.12.3. Search Form](#)

##### [1.1.12.3.1. AdvancedSearchTypes](#)

Valeur par défaut : itemtype

Asks: Show checkboxes to search by \_\_\_ on the OPAC and staff advanced search pages.

Valeurs :

collection code

itemtype

---

##### [1.1.12.3.2. expandedSearchOption](#)

Valeur par défaut : don't show

Asks: By default, \_\_\_ "More options" on the OPAC and staff advanced search pages.

Valeurs :

don't show

show

---

---

### [1.1.13. Staff Client](#)

---

#### [1.1.13.1. Appearance](#)

---

##### [1.1.13.1.1. intranet includes](#)

Valeur par défaut : includes

Asks: Use include files from the \_\_\_ directory in the template directory, instead of includes/. (Leave blank to disable)

---

##### [1.1.13.1.2. intranetcolorstylesheet](#)

Asks: Include the stylesheet /intranet-tmpl/prog/en/css/ \_\_\_ on all pages in the staff interface.

Leave this field blank to disable.

---

##### [1.1.13.1.3. IntranetmainUserblock](#)

Asks: Show the following HTML in its own column on the main page of the staff client

---

##### [1.1.13.1.4. IntranetNav](#)

Asks: Show the following HTML in the More menu at the top of each page on the staff client (should be a list of links or blank)

---

##### [1.1.13.1.5. intranetstylesheet](#)

Asks: Include the stylesheet at \_\_\_ on all pages in the staff interface, instead of the default.

This should be a complete URL, starting with http://

---

##### [1.1.13.1.6. intranetuserjs](#)

Asks: Include the following JavaScript on all pages in the staff interface

---

##### [1.1.13.1.7. language](#)

Valeur par défaut : English

Asks: Enable the following languages on the staff interface

Valeurs :

English

To install additional languages you need to run misc/translation/install-code.pl. For example, to install French you would run the following command *install-code.pl fr-FR* to make the templates, once they exist and are in the right place then they will show up as an option in this preference.

---

##### [1.1.13.1.8. staffClientBaseURL](#)

Asks: The staff client is located at http:// \_\_\_

---

##### [1.1.13.1.9. template](#)

Valeur par défaut : prog

Asks: Use the \_\_\_ theme on the staff interface.

Valeurs :

prog

---

#### [1.1.13.1.10. yuipath](#)

Valeur par défaut : included with Koha

Asks: Use the Yahoo UI libraries \_\_\_\_

Valeurs :

from Yahoo's servers

With this option there is less demand on your servers, but if the Internet goes down there will be issues

included with Koha

With this option calls are made faster, and they will still work if the Internet goes down

---

#### [1.1.13.2. Options](#)

##### [1.1.13.2.1. viewISBD](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ staff to view records in ISBD form on the staff client.

Valeurs :

Allow

Don't allow

---

##### [1.1.13.2.2. viewLabeledMARC](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ staff to view records in labeled MARC form on the staff client.

Valeurs :

Allow

Don't allow

---

##### [1.1.13.2.3. viewMARC](#)

Valeur par défaut : Allow

Asks: \_\_\_\_ staff to view records in plain MARC form on the staff client.

Valeurs :

Allow

Don't allow

---

##### [1.1.13.2.4. HidePatronName](#)

Valeur par défaut : Show

Asks: \_\_\_\_ the names of patrons that have items checked out or on hold on detail pages or the "Place Hold" screen.

Valeurs :

Don't show

Show

---

## [1.1.14. Web Services](#)

---

### [1.1.14.1. OAI-PMH](#)

---

#### [1.1.14.1.1. OAI-PMH](#)

Valeur par défaut : Disable

Asks: \_\_\_ Koha's OAI-PMH server.

Valeurs :

Disable

Enable

Learn more about OAI-PMH at: <http://www.openarchives.org/pmh/>

---

#### [1.1.14.1.2. OAI-PMH:archiveID](#)

Valeur par défaut : KOHA-OAI-TEST

Asks: Identify records at this site with the prefix \_\_\_ :

---

#### [1.1.14.1.3. OAI-PMH:MaxCount](#)

Valeur par défaut : 50

Asks: Only return \_\_\_ records at a time in response to a ListRecords or ListIdentifiers query.

---

## [1.2. Paramètres de base](#)

Configurez tous les paramètres dans l'ordre dans lequel ils apparaissent.

---

### [1.2.1. Bibliothèques & Groupes](#)

Lorsque vous allez paramétrer votre installation Koha, vous pourrez ajouter des informations pour chaque bibliothèque partageant votre système. Ces informations sont utilisées dans différents modules de Koha.

Quand vous consultez cette page, vous voyez la liste des bibliothèques et des groupes déjà ajoutés au système.

---

#### [1.2.1.1. Ajouter un site](#)

Pour ajouter une nouvelle bibliothèque:

Cliquer 'Ajouter site'

Remplir les informations demandées dans le formulaire qui s'ouvre

Parmi les champs, seuls 'Code du site' et 'Nom' sont obligatoires

Veillez à saisir l'adresse mail du site afin que les notifications soient bien envoyées, et à partir de, la bonne adresse

Une adresse IP est obligatoire si vous avez activé AutoLocation

---

#### [1.2.1.2. Modifier/Supprimer un site](#)

Vous ne pourrez pas supprimer un site qui a des lecteurs ou des exemplaires rattachés à ce site.

Chaque site a un lien 'Modifier' sur sa droite. Cliquer ce lien pour Éditer / modifier les détails du site concerné

Vous ne pouvez pas modifier le 'Code du site'

---

### 1.2.1.3. Ajouter un groupe

Pour ajouter un groupe par domaine de recherche ou par propriété des sites, cliquer le bouton 'Ajouter groupe'

Parmi les champs du formulaire de création de groupe, seuls 'Code catégorie' et 'Nom' sont obligatoires

---

#### 1.2.1.3.1. Groupes par domaine de recherche

Les groupes par domaine de recherche vous permettent de faire une recherche sur tout un groupe de bibliothèques en même temps plutôt que rechercher dans une seule bibliothèque ou dans toutes les bibliothèques.

Pour voir l'usage des Groupes par domaine de recherche, consultez la page de recherche avancée sur l'interface professionnelle de Koha :

---

#### 1.2.1.3.2. Groupes par propriété des sites

Vous pouvez attribuer des catégories spécifiques à vos bibliothèques en ajoutant des groupes pour ces catégories

Les propriétés sont ajoutées au site via le formulaire de saisie ou de modification du site.

---

### 1.2.2. Types de document et codes de collection

Koha vous permet d'organiser votre collection par types de document et codes de collection. En général le type de document se réfère au support matériel (livre, cd, dvd, etc), mais peut être utilisé de n'importe quelle façon qui convienne à votre bibliothèque.

---

#### 1.2.2.1. Ajouter des types de document

Pour ajouter un nouveau type de document, cliquez simplement le bouton 'Ajouter type de document' en haut de la page des types de documents.

Dans le champ 'Type de document', entrez un code court pour votre type de document

La Description est la définition en texte du type de document

Vous pouvez choisir d'associer une image à votre type de document

Vous pouvez choisir à partir de plusieurs collections d'images

Vous pouvez lier à une image distante

Ou vous pouvez ne pas avoir d'image associée au type de document

Pour que les images des types de document apparaissent à l'OPAC vous devez positionner `noItemTypesImages` sur 'Montrer'

Aller dans : Plus > Administration > Préférences Système > [Admin](#)

Pour les types de document non empruntables, cochez l'option 'exclu du prêt'

Les exemplaires marqués 'exclu du prêt' sont visibles dans le catalogue mais ne peuvent pas être prêtés aux lecteurs

Pour les types de documents dont le prêt est payant, saisissez le coût du prêt dans la zone 'Coût du prêt'

Ne saisissez pas de symboles dans ce champ, uniquement des nombres et points décimaux (ex. 5.00 €, doit être saisi sous la forme 5 ou 5.00)

Ceci ajoutera le coût au lecteur lors du prêt

Lorsque vous avez fini, cliquez le bouton 'Enregistrer les modifications'

Tous les champs, à l'exception de 'Type de document' sont modifiables à partir de la liste des types de document

Votre nouveau type de document apparaîtra désormais dans la liste

---

### 1.2.2.2. Modifier les types de documents

Chaque type de document a un bouton Modifier sur sa ligne. Pour modifier un type de document, cliquez simplement sur 'Modifier'.

Vous ne pourrez pas modifier le code que vous avez défini pour 'Type de document' mais vous pourrez modifier la description.

---

### 1.2.2.3. Supprimer les types de documents

Chaque type de document a un bouton Supprimer sur sa ligne. Pour effacer un type de document, cliquez simplement sur 'Supprimer'.

Vous ne pourrez pas supprimer des types de documents utilisés dans des notices ou des exemplaires de la base.

---

### 1.2.3. Valeurs autorisées

Les valeurs autorisées peuvent être utilisées dans plusieurs modules de Koha. Vous pouvez avoir besoin d'ajouter une catégorie de valeurs autorisées pour contrôler les valeurs saisies dans un champ MARC lors du catalogage.

---

#### 1.2.3.1. Catégories existantes

Des catégories prédéfinies sont installées dans Koha ; votre bibliothèque a des chances de les utiliser, par exemple 'Lost'.

Asort1

utilisé pour des informations statistiques au niveau des acquisitions

Asort2

utilisé pour des informations statistiques au niveau des acquisitions

BOR\_NOTES

valeurs pour des notes personnalisées au lecteur qui peuvent apparaître sur l'écran de circulation et à l'OPAC.

Bsort1

utilisé pour des informations statistiques au niveau des adhérents

Bsort2

utilisé pour des informations statistiques au niveau des adhérents

CART

is the shelving cart location, used by [InProcessingToShelvingCart](#) and [ReturnToShelvingCart](#)

CCODE

codes de collection (visibles au catalogage de la notice ou des exemplaires)

DAMAGED

descriptions pour les exemplaires marqués comme endommagés (visible au catalogage des exemplaires)

HINGS\_AS

General Holdings: Acquisition Status Designator :: This data element specifies acquisition status for the unit at the time of the holdings report.

HINGS\_C

General Holdings: Completeness Designator

## HINGS\_PF

Physical Form Designators

## HINGS\_RD

General Holdings: Retention Designator :: This data element specifies the retention policy for the unit at the time of the holdings report.

## HINGS\_UT

General Holdings: Type of Unit Designator

## LOC

Localisation (visible habituellement Ã l'ajout ou la modification d'exemplaire)

## LOST

descriptions pour les exemplaires marquÃ©s comme perdus (visible Ã l'ajout ou la modification d'exemplaire)

## MANUAL\_INV

values for manual invoicing types

## NOT\_LOAN

raisons pour lesquelles un document est exclu du prÃ©t (statuts de l'exemplaire)

## PROC

the location to be used for NewItemsDefaultLocation (change description as desired), also the location expected by [InProcessingToShelvingCart](#).

## RESTRICTED

restricted status of an item

## SUGGEST

listes des raisons de rejet ou d'acceptation d'une suggestion lecteur (visible Ã la gestion des suggestions)

## WITHDRAWN

descriptions pour les exemplaires retirÃ©s (visible Ã l'ajout ou la modification d'exemplaire)

---

### [1.2.3.2. Ajouter une nouvelle catÃ©gorie de valeurs autorisÃ©es](#)

En plus des catÃ©gories existantes prÃ©sentes par dÃ©faut dans Koha, les bibliothÃ©ques peuvent ajouter leurs propres catÃ©gories de valeurs autorisÃ©es pour contrÃ´ler les valeurs qui sont entrÃ©es dans le systÃ©me. Pour ajouter une nouvelle catÃ©gorie:

Cliquez sur 'Ajouter catÃ©gorie'

Limitez votre CatÃ©gorie Ã 11 caractÃ©res (quelque chose de court indiquant clairement Ã quoi sert la catÃ©gorie)

A l'ajout d'une nouvelle catÃ©gorie vous crÃ©ez au moins une valeur autorisÃ©e

Saisissez un code pour votre valeur autorisÃ©e dans le champ 'Valeur autorisÃ©e'

Utiliser le champ description pour donner l'intitulÃ© de la valeur

Utiliser le champ description (OPAC) pour prÃ©ciser l'intitulÃ© visible Ã l'opac

Cliquez 'Enregistrer'

Votre nouvelle catégorie et sa valeur vont apparaître dans la liste des Valeurs autorisées

---

### **1.2.3.3. Ajouter une nouvelle valeur autorisée**

De nouvelles valeurs autorisées peuvent être ajoutées à une catégorie, existante ou nouvelle. Pour ajouter une valeur :

Cliquez 'Ajouter valeur autorisée pour...'

Saisissez un code pour votre valeur autorisée dans le champ 'Valeur autorisée'

Utiliser le champ description pour donner l'intitulé de la valeur

Utiliser le champ description (OPAC) pour préciser l'intitulé visible à l'opac

Cliquez 'Enregistrer'

La nouvelle valeur va apparaître dans la liste parmi les valeurs existantes.

---

## **1.3. Adhérents & Circulation**

Paramètres pour déterminer les informations adhérent et les règles de circulation.

---

### **1.3.1. Catégories adhérent**

Les catégories d'adhérent vous permettent d'organiser vos lecteurs en fonction de différents rôles, groupes d'âge et types de lecteurs.

Les catégories de lecteur dont rattachées à ces six types de catégorie :

Adulte

Le type d'adhérent le plus habituel, pouvant être utilisé pour une catégorie globale Adhérents. Les adhérent de type Adulte peuvent être garants des adhérents de type Enfant.

Enfant

Les adhérents de type Enfant peuvent être rattachés à un garant.

Bibliothécaire

Les adhérents de ce type de catégorie font généralement partie de l'équipe de la bibliothèque.

Collectivité

Les adhérents de ce type de catégorie sont des collectivités. Les collectivités peuvent être garants des adhérents de type Professionnel.

Professionnel

Les adhérents de type Professionnel peuvent être liés aux adhérents Collectivité

Statistiques

Ce type de catégorie est utilisé uniquement à des fins statistiques, par exemple pour la consultation sur place.

---

#### **1.3.1.1. Ajouter une catégorie d'adhérent**

Pour ajouter une nouvelle catégorie d'adhérent cliquez 'Ajouter catégorie' en haut de la page

Le 'Code catégorie' est un identifiant pour votre nouveau code.

Le code catégorie est limité à 10 caractères (chiffres et lettres)

Saisissez le texte descriptif de la catégorie dans le champ 'Description'.

La durée d'inscription doit être remplie si vous avez une durée d'inscription limitée pour vos lecteurs (ex les cartes étudiant expirent après 12 mois)

Certaines catégories d'adhérent peuvent posséder un âge minimum requis, entrez cet âge dans 'Age requis'

Certaines catégories d'adhérent peuvent également posséder un âge maximum (par exemple les enfants), entrez cet âge dans 'Limite d'âge supérieure'

Si vous avez des frais d'inscription pour les lecteurs, vous pouvez saisir le montant dans le champ 'Frais d'inscription'

Ne saisissez que des nombres et décimaux dans ce champ (le séparateur décimal est le point)

Si vous voulez que vos adhérents reçoivent des lettres de rappel, positionnez 'Message de retard demandé' sur 'Oui'

Si la réservation de document est payante, saisissez le montant dans le champ 'Coût de réservation'.

Ne saisissez que des nombres et décimaux dans ce champ (le séparateur décimal est le point)

Dans le champ 'Type de catégorie' choisissez l'un des six types de catégories

Enfin vous pouvez attribuer par défaut des préférences de notification avancée à une catégorie d'adhérent

Ceci nécessite que la préférence système EnhancedMessagingPreferences soit activée

Allez dans : Plus > Administration > Préférences système > Adhérents > [EnhancedMessagingPreferences](#)

Ceci peut être modifié pour chaque lecteur individuellement, ce paramétrage permet juste de configurer plus facilement les messages de façon globale pour toute une catégorie d'adhérent

---

### **1.3.2. Villes et communes**

Vous pouvez définir des villes ou communes de votre région afin que lors de l'ajout d'un nouvel adhérent la bibliothèque puisse choisir la ville dans une liste déroulante au lieu de taper la ville et le code postal.

---

#### **1.3.2.1. Ajouter une commune**

Pour ajouter une nouvelle commune, cliquez le bouton 'Ajouter commune' en haut de page et saisissez le nom de la commune et le code postal

Une fois que vous avez cliqué 'Valider', votre commune est sauvegardée et apparaît dans la liste sur la page des Villes et communes

Les communes peuvent être modifiées et supprimées n'importe quand.

---

#### **1.3.2.2. Visualiser les villes dans le formulaire d'ajout d'un adhérent**

Si vous avez défini des communes, à l'ajout ou la modification d'une fiche adhérent, vous voyez ces villes dans un menu déroulant qui vous permet de les choisir facilement.

Ceci vous permet d'ajouter facilement ces informations à la fiche adhérent en évitant les fautes de frappe toujours possibles et les erreurs de code postal.

---

### **1.3.3. Types de voies**

Vous pouvez définir des types de voies afin que lors de l'ajout d'un nouvel adhérent la bibliothèque puisse choisir le type de rue dans une liste déroulante au lieu de faire la saisie.

Si vous souhaitez que les types de voies soient toujours écrits en abrégé dans la fiche adhérent, vous saisissez ici les abréviations correspondantes, si vous souhaitez que les types de voies soient écrits en toutes lettres, saisissez les ainsi.

---

#### **1.3.3.1. Ajouter des types de voies**

Pour ajouter un type de voie, cliquez 'Ajouter type de voie' et ensuite entrez le type de voie de la façon dont vous souhaitez qu'il s'affiche.

Une fois que vous avez soumis le formulaire, votre nouveau type de voie apparaît dans la liste sur la page Type de voie.

---

### [1.3.3.2. Visualiser les types de voies dans le formulaire d'ajout d'un adhérent](#)

Lorsque vous ajoutez ou modifiez une fiche adhérent, si vous avez défini des types de voies, il y aura un menu déroulant vous permettant de les choisir.

---

### [1.3.4. Attributs adhérent](#)

Les attributs adhérent peuvent être utilisés pour définir des champs personnalisés pour les fiches adhérent. Un exemple d'utilisation peut être un numéro étudiant, une filière d'étude...

---

#### [1.3.4.1. Ajouter des attributs adhérent](#)

Pour ajouter un nouvel attribut, cliquez le bouton 'Ajouter attribut adhérent' en haut de page.

Dans le champ 'Code d'attribut adhérent', entrez un code court pour identifier l'attribut

Ce champ est limité à 10 caractères (chiffres et lettres uniquement)

Ce champ ne peut pas être modifié une fois que l'attribut a été défini

Dans le champ 'Description', entrez l'intitulé du contenu du champ (texte libre)

Cochez la case 'Réplicable' pour pouvoir définir plusieurs valeurs pour cet attribut dans la fiche adhérent

Ce paramètre ne peut pas être modifié une fois que l'attribut a été défini

Si 'Identifiant unique' est coché, l'attribut sera un identifiant unique, si une fiche adhérent comporte une valeur, la même valeur ne pourra pas être attribuée à une autre fiche.

Ce paramètre ne peut pas être modifié une fois que l'attribut a été défini

Cochez 'Mot de passe autorisé' pour donner la possibilité d'associer un mot de passe à cet attribut

Cochez 'Affichage à l'OPAC' pour afficher cet attribut sur la fiche détaillée d'un adhérent à l'OPAC.

Cliquez 'Interrogeable' pour pouvoir faire une recherche sur cet attribut dans la recherche lecteur en interface professionnelle

Catégorie de valeur autorisée : si une catégorie est sélectionnée, seules les valeurs faisant partie de la liste de valeurs autorisées seront possibles pour cet attribut dans la fiche adhérent.

Vous aurez d'abord besoin d'ajouter une liste de valeurs autorisées pour qu'elle apparaisse dans ce menu déroulant

Allez dans : Plus > Administration > Catalogue > [Valeurs autorisées](#)

Une liste de valeurs autorisées n'est pas utilisée lors de l'import d'un lot d'adhérents.

Cliquez 'Enregistrer' pour sauvegarder votre nouvel attribut.

Une fois ajouté votre attribut est visible dans la liste des attributs, et également dans le formulaire d'ajout / modification d'un adhérent.

---

#### [1.3.4.2. Modifier / supprimer des attributs adhérents](#)

Chaque ligne correspond à un attribut adhérent a un lien Modifier et un lien Supprimer dans la liste des attributs

Certains champs de l'attribut ne pourront pas être modifiés une fois créés :

Code d'attribut adhérent

Réplicable

Identifiant unique

Vous ne pourrez pas supprimer un attribut s'il est utilisé.

---

### [1.3.5. Règles de prêt et d'amendes](#)

Ces règles définissent la façon dont vos exemplaires circulent, comment et quand les amendes sont calculées, et comment les réservations sont gérées. Les règles s'appliquent de la plus spécifique à la plus générale, en utilisant la première qui correspond, dans cet ordre :

mÃªme site, mÃªme catÃ©gorie d'adhÃ©rent, mÃªme type de document

mÃªme site, mÃªme catÃ©gorie d'adhÃ©rent, type de document par dÃ©faut

mÃªme site, catÃ©gorie d'adhÃ©rent par dÃ©faut, mÃªme type de document

mÃªme site, catÃ©gorie d'adhÃ©rent par dÃ©faut, type de document par dÃ©faut

site par dÃ©faut, mÃªme catÃ©gorie d'adhÃ©rent, mÃªme type de document

site par dÃ©faut, mÃªme catÃ©gorie d'adhÃ©rent, type de document par dÃ©faut

site par dÃ©faut, catÃ©gorie d'adhÃ©rent par dÃ©faut, mÃªme type de document

site par dÃ©faut, catÃ©gorie d'adhÃ©rent par dÃ©faut, type de document par dÃ©faut

Si vous n'avez qu'un seul site dans votre systÃ©me, vous pouvez laisser la sÃ©lection du site sur 'Par dÃ©faut' ou choisir le nom de votre site et vÃ©rifier que les rÃ©sultats sont les mÃªmes.

---

### **1.3.5.1. RÃ©gles de prÃªt par dÃ©faut**

A l'aide du tableau des rÃ©gles de prÃªt vous pouvez dÃ©finir des rÃ©gles qui dÃ©pendent des combinaisons catÃ©gories d'adhÃ©rents / types de document. Pour dÃ©finir vos rÃ©gles, choisissez un site Ã  partir du menu dÃ©roulant :

Si vous laissez ce paramÃ©tre 'Par dÃ©faut' les rÃ©gles s'appliqueront Ã  toutes les bibliothÃ©ques.

A partir du tableau vous pouvez choisir n'importe quelle combinaison de catÃ©gories d'adhÃ©rent et de types de document pour y appliquer les rÃ©gles :

Dans un premier temps choisissez Ã  quelle catÃ©gorie d'adhÃ©rent s'appliquent la rÃ©gle. Si vous laissez 'Par dÃ©faut' cela s'appliquera Ã  toutes les catÃ©gories de lecteurs

Choisissez le 'Type de document' auquel s'applique la rÃ©gle. Si vous laissez 'Par dÃ©faut' cela s'appliquera Ã  tous les types de document

Limitez le nombre d'exemplaires qu'un adhÃ©rent peut emprunter en mÃªme temps en ajoutant une valeur dans le champ 'PrÃªts autorisÃ©s'

DÃ©finissez la durÃ©e du prÃªt en saisissant un nombre de jours dans le champ 'DurÃ©e de prÃªt'

'Montant de l'amende' contient le montant de la pÃ©nalitÃ© financiÃ©re attribuÃ©e pour les documents en retard

Ne saisissez que des valeurs numÃ©riques (et dÃ©cimales, le sÃ©parateur est le point)

Saisissez la 'PÃ©riodicitÃ© de l'amende' en jours (ex. l'amende augmente tous les 1 jour, ou tous les 2 jours)

La 'PÃ©riode de grÃ¢ce' est la durÃ©e pendant laquelle un document peut Ãªtre en retard avant de commencer Ã  compter des pÃ©nalitÃ©s

Vous pouvez attribuer des pÃ©nalitÃ©s en jours de suspension en saisissant des jours dans le champ 'Suspension en jours'.

'Renouvellements' permet d'indiquer le nombre de prolongations de prÃªts autorisÃ©es pour ce type de document et cette catÃ©gorie d'adhÃ©rent

'RÃ©servations' indique le nombre de rÃ©servations simultanÃ©es de ce type de document que peut faire un adhÃ©rent

Lorsque vous avez fini, cliquez 'Ajouter' pour enregistrer votre rÃ©gle

Pour modifier une rÃ©gle, il est nÃ©cessaire d'en crÃ©er une nouvelle pour la mÃªme catÃ©gorie d'adhÃ©rent et le mÃªme type de document

---

### **1.3.5.2. Nombres de prÃªts par dÃ©faut et politique de rÃ©servation**

Vous pouvez dÃ©finir un nombre maximum de prÃªts, et une politique de rÃ©servation, qui seront utilisÃ©s si rien n'est dÃ©fini plus bas pour un type de document particulier ou une catÃ©gorie d'adhÃ©rent.

A partir de ce tableau vous pouvez dÃ©finir un paramÃ©trage par dÃ©faut qui s'appliquera Ã  tous les types de document et toutes les catÃ©gories d'adhÃ©rents dans la bibliothÃ©que.

Dans 'Nombre total de prÃªts autorisÃ©s' saisissez le nombre total de documents que les lecteurs peuvent emprunter Ã  la fois

PrÃ©cisez Ã  partir d'oÃ¹ les lecteurs peuvent rÃ©server Ã  l'aide du menu 'Politique de rÃ©servation' :

A partir de tout site. Les lecteurs de toutes les bibliothÃ©ques peuvent rÃ©server ce document (comportement par dÃ©faut si rien n'est prÃ©cisÃ©)

A partir du site de rattachement. Seuls les adhérents inscrits dans la bibliothèque que possède le document ont la possibilité de réserver le document.

Réservation non autorisée. Aucun lecteur n'a la possibilité de réserver un document

---

### 1.3.5.3. Prêts par catégorie d'adhérent

Pour la bibliothèque, vous pouvez préciser le nombre maximum de prêts qu'un lecteur d'une catégorie donnée peut avoir, indépendamment du type de document..

Si le nombre total de prêts autorisés pour une catégorie d'adhérent est laissé vide, aucune limite ne s'applique, sauf si vous avez défini une limite pour un type de document particulier.

---

### 1.3.5.4. Règles de réservations

Pour la bibliothèque, vous pouvez ajouter des règles pour un type de document donné, indépendamment de la catégorie adhérent. Actuellement ceci concerne les réservations.

Les différentes règles ont les actions suivantes :

A partir de tout site. Les lecteurs de toutes les bibliothèques peuvent réserver ce document (comportement par défaut si rien n'est précisé)

A partir du site de rattachement. Seuls les adhérents inscrits dans la bibliothèque que possède le document ont la possibilité de réserver un document de ce type

Réservation non autorisée. Aucun lecteur n'a la possibilité de réserver ce type de document

Notez que si la préférence système [AllowHoldPolicyOverride](#) est positionnée sur 'allow', ces règles peuvent être dépassées lors des opérations de circulation.

Ces règles sont basées sur la bibliothèque de rattachement des adhérents, pas sur la bibliothèque de rattachement du professionnel effectuant la réservation.

---

### 1.3.6. Limitation de transfert entre bibliothèques

Ces règles, basées sur le site qui envoie, le site qui reçoit et, selon la valeur choisie pour la préférence système BranchTransferLimitsType le type de document (itemtype) ou le code de collection (ccode) des documents concernés, permettent de limiter le transfert des documents entre les bibliothèques. Ces règles s'appliquent uniquement si la préférence système UseBranchTransferLimits est positionnée sur 'enforce'.

Aller dans : Plus > Administration > Préférences système > Circulation > [UseBranchTransferLimits](#)

Les limitations de transfert sont basées soit sur les codes de collection que vous avez définis dans le module [Valeurs autorisées](#) au niveau de l'Administration.

Soit sur les types de document définis dans le module Types de documents.

Les codes de collection apparaissent sous forme d'onglets au-dessus du tableau

Cochez les cases pour les documents qui ne doivent pas être transférés

Dans l'exemple ci-dessus aucun exemplaire de la collection Fiction ne peut être transféré à partir de FRL. De plus, aucun exemplaire de la collection Fiction ne peut être transféré de CPL vers FFL, FPL ou FRL.

---

### 1.3.7. Alertes de circulation

Les bibliothèques peuvent décider si elles souhaitent que les lecteurs soient automatiquement notifiés lors des actions de circulation (retours et prêts). Ces paramètres sont basés sur les catégories adhérent et les types de documents.

Ces préférences peuvent être dépassées par des modifications dans les préférences individuelles de notifications pour les lecteurs.

Pour paramétrer les alertes de circulation :

Choisissez votre site à partir du menu déroulant

Pour définir les préférences pour toutes les bibliothèques, sélectionner la valeur 'Par défaut'

Par défaut tous les types de documents et toutes les catégories de lecteurs sont notifiés des retours et des prêts. Pour modifier ceci, cliquez sur la combinaison type de document / type de lecteur pour laquelle vous souhaitez stopper les notifications.

dans l'exemple ci-dessus, les Juveniles et les Kids ne recevront pas de notification de prêt

---

## 1.4. Catalogue

Terminez ces paramètres avant de commencer à cataloguer dans Koha.

---

### 1.4.1. Grilles de catalogage MARC

Considérez les grilles comme des modèles pour la création de nouvelles notices bibliographiques. Koha est installé avec quelques grilles prédéfinies qui peuvent être modifiées ou supprimées, et les bibliothécaires peuvent créer leurs propres grilles pour des contenus spécifiques à leurs bibliothèques.

Ne supprimez pas ou ne modifiez pas la grille par défaut, ceci pourrait générer des problèmes sur vos notices - créez toujours une nouvelle grille basée sur la grille par défaut, ou modifiez les autres grilles.

---

#### 1.4.1.1. Ajouter une nouvelle grille

Pour ajouter une nouvelle grille de catalogage

Cliquez 'Ajouter grille de catalogage'

Saisissez un code d'au plus 4 caractères

Utilisez le champ Description pour entrer une définition plus détaillée de votre grille

Cliquez 'Valider'

Une fois votre grille ajoutée cliquez 'Structure MARC' sur la ligne dans la liste des grilles

Koha vous demande de choisir la grille sur laquelle vous voulez baser votre nouvelle grille ; ceci sera plus facile que de partir d'une grille vide

Une fois que votre grille apparaît à l'écran vous pouvez modifier ou supprimer chaque champ en suivant les instructions pour [modifier les sous-champs](#)

---

#### 1.4.1.2. Modifier les grilles existantes

Cliquez 'Modifier' sur la ligne de la grille dans la liste vous permet seulement de modifier la Description de la grille.

Pour éditer les champs de la grille vous devez d'abord cliquer 'Structure MARC' et ensuite suivre les instructions pour [modifier les sous-champs](#)

---

#### 1.4.1.3. Modifier les sous-champs d'une grille

Les grilles sont constituées de champs et sous-champs MARC. Pour modifier la plupart des grilles vous devez éditer les champs et les sous-champs. Cliquer 'Modifier' à la droite de chaque champ vous permet de modifier le texte associé au champ.

Chaque champ a un numéro de champ (qui est le code MARC)

Le 'Texte pour bib' est ce qui sera visible au niveau de l'interface professionnelle si vous avez activé [advancedMARCeditor](#) pour afficher les intitulés

Le 'Texte pour OPAC' est ce qui sera affiché sur la vue MARC à l'OPAC

Si vous cochez 'Répétable', il y aura un signe plus au niveau du champ dans la grille de saisie vous permettant d'ajouter plusieurs valeurs pour ce champ

Si vous cochez 'Obligatoire' la notice ne pourra pas être enregistrée tant que vous n'aurez pas saisi une valeur pour ce champ.

'Valeur autorisée' vous permet de proposer une [valeur autorisée](#) que les catalogueurs peuvent choisir dans un menu déroulant à la saisie

Pour éditer les sous-champs associés au champ, cliquez 'Sous-champs' à droite du champ dans la liste 'Structure MARC'

A partir de la liste des sous-champs vous pouvez cliquer 'Supprimer' à droite de chaque ligne pour supprimer le sous-champ

Pour éditer les sous-champs cliquez le bouton 'Modifier les sous-champs'

Pour chaque sous-champ vous pouvez définir :

Texte pour bibliothécaire

ce qui est affiché avant le sous-champ en interface professionnelle

Texte à l'OPAC

ce qui est affiché avant le sous-champ à l'OPAC

si cette information n'est pas remplie, le texte pour bibliothécaire est utilisé

Repérable

un signe plus sera affiché au niveau du sous-champ dans la grille de saisie, vous permettant d'ajouter plusieurs valeurs pour ce sous-champ

Obligatoire

la notice ne pourra pas être enregistrée tant que vous n'aurez pas saisi une valeur pour ce sous-champ.

Groupé dans l'onglet

définit l'onglet dans lequel le sous-champ est visible. Tous les sous-champs d'un champ doivent être groupés dans le même onglet, ou ignorés. Ignorer signifie que les sous-champs ne sont pas groupés.

Valeur par défaut

permet de définir la valeur par défaut d'un sous-champ ; si le champ est relié à une liste de valeurs autorisées, la valeur par défaut doit être la valeur autorisée et non sa description (ex : mettre fre et non Français pour la langue)

caché

vous permet de choisir parmi 19 conditions possibles de visibilité du sous-champ, dont 17 sont implémentées. Il s'agit des possibilités suivantes :

-9 => Usage futur

-8 => Flag

-7 => OPAC !Intranet !Editeur Plié

-6 => OPAC Intranet !Editeur !Plié

-5 => OPAC Intranet !Editeur Plié

-4 => OPAC !Intranet !Editeur !Plié

-3 => OPAC !Intranet Editeur Plié

-2 => OPAC !Intranet Editeur !Plié

-1 => OPAC Intranet Editeur Plié

0 => OPAC Intranet Editeur !Plié

1 => !OPAC Intranet Editeur Plié

2 => !OPAC !Intranet Editeur !Plié

3 => !OPAC !Intranet Editeur Plié

4 => !OPAC Intranet Editeur !Plié

5 => !OPAC !Intranet !Editeur !PliÃ©

6 => !OPAC Intranet !Editeur !PliÃ©

7 => !OPAC Intranet !Editeur PliÃ©

8 => !OPAC !Intranet !Editeur !PliÃ©

9 => Usage futur

( ! signifie 'non visible', ou dans le cas de PliÃ© : 'non PliÃ©')

Est une URL

si la case est cochÃ©e, cela signifie que le sous-champ est une url et peut Ãªtre cliquÃ©

Lien

vous pouvez entrer ici le nom d'un index zebra. A l'affichage marc de la notice en interface professionnelle, vous verrez apparaÃªtre Ã© cÃ©tÃ© du sous-champ une petite loupe, qui vous permettra de rechercher la valeur du sous-champ dans l'index voulu. Ceci peut Ãªtre utilisÃ© principalement dans deux cas :

sur un sous-champ comme auteur (200f en UNIMARC, index zebra au), mettez 'au' ici, vous pourrez rebondir vers toutes les notices ayant ce mÃªme auteur

sur un champ qui est un lien (4XX) pour obtenir une autre notice. Par exemple, mettre 'ns' (index zebra pour l'issn) en 464\$x vous permettra de retrouver les notices de pÃ©riodique avec cet issn

Cette valeur ne doit pas Ãªtre modifiÃ©e une fois que des notices ont Ã©tÃ© entrÃ©es dans la base

Lien Koha

Koha est compatible avec plusieurs formats MARC. Koha ne sait pas Ã© quoi correspond le champ 245\$a, ni 200\$a (ces deux champs Ã©tant le titre, en MARC21 et en UNIMARC). Donc dans cette liste vous pouvez faire correspondre un sous-champ MARC Ã© sa signification. Koha conserve la cohÃ©rence entre un sous-champ et sa signification. Quand un utilisateur veut rechercher le 'titre', ce lien est utilisÃ© pour trouver ce qui doit Ãªtre recherchÃ© (245 en MARC21, 200 en UNIMARC).

Valeur autorisÃ©e

signifie que la valeur ne doit pas Ãªtre tapÃ©e par le bibliothÃ©caire, mais doit Ãªtre choisie Ã© partir d'un menu dÃ©roulant gÃ©nÃ©rÃ© par une liste de [valeurs autorisÃ©es](#)

Dans l'exemple ci-dessus, le sous-champ 608a affichera la liste de valeurs autorisÃ©es 'genre' lors de la saisie :

ThÃ©saurus

signifie que la valeur n'est pas libre, mais doit Ãªtre recherchÃ©e dans l'autoritÃ© / thÃ©saurus de la catÃ©gorie sÃ©lectionnÃ©e

Plugin

signifie que la valeur est calculÃ©e ou gÃ©nÃ©rÃ©e par un plugin. Les plugins peuvent faire presque tout.

Par exemple, en UNIMARC, il y a un plugin pour chaque champ codÃ© 1XX. Le plugin est d'une grande aide pour le catalogueur ! Il y a aussi deux plugins (unimarc\_field\_210c and unimarc\_field\_225a ) qui peuvent retrouver un Ã©diteur Ã© partir d'une racine ISBN ainsi que la liste des collections pour cet Ã©diteur. Notez aussi le plugin unimarc\_field\_4XX.pl qui vous permet de rechercher le titre d'une notice Ã© lier au niveau d'un champ 4XX.

Pour sauvegarder vos changements, cliquez simplement sur le bouton 'Enregistrer les modifications' en haut de l'Ã©cran.

---

#### [1.4.2. Liens Koha => MARC](#)

---

#### [1.4.3. Liens intitulÃ©s => MARC](#)

---

#### [1.4.4. Validation grilles de catalogage](#)

Vérifiez la structure MARC. Si vous modifiez votre grille de catalogage, il est recommandé d'utiliser cet outil pour détecter les erreurs dans le paramétrage.

---

#### [1.4.5. Types d'autorités](#)

Les types d'autorités sont des grilles MARC pour les autorités, et par conséquent suivent les mêmes règles d'édiction que celles décrites dans la section [Grilles de catalogage MARC](#) de ce manuel. Plusieurs grilles d'autorités sont pré-définies lorsque vous installez Koha. Pour voir comment ajouter et modifier des types d'autorités, reportez-vous à la section [Grilles de catalogage MARC](#) de ce manuel.

---

#### [1.4.6. Sources de classification](#)

#### [1.4.7. Règles de concordance](#)

### [1.5. Acquisitions](#)

#### [1.5.1. Devises et taux de change](#)

Si vous passez des commandes à partir de plusieurs pays vous allez pouvoir saisir les taux de change entre devises pour que le module d'acquisitions calcule correctement les sommes.

Ces données ne sont pas mises à jour automatiquement, donc veillez à les maintenir à jour afin que vos comptes soient corrects

---

#### [1.5.2. Budgets, périodes budgétaires, planning](#)

#### [1.5.3. Budget racine](#)

### [1.6. Paramètres divers](#)

#### [1.6.1. Mots vides](#)

Si NoZebra est positionné sur 'Use' cette option n'apparaîtra pas dans le menu

**Les mots vides dont les mots que vous souhaitez voir ignorés par la recherche. Koha possède une liste pré-définie de mots vides que vous pouvez modifier dans le menu Mots vides du module administration.**

**Pour ajouter un nouveau mot vide à la liste, cliquez le bouton 'Ajouter mot vide' et ajouter le terme que vous souhaitez ignorer.**

Si vous apportez des modifications à cette table, demandez à votre administrateur de lancer le script misc/batchRebuildBiblioTables.pl .

---

#### [1.6.2. Serveurs Z39.50](#)

Koha possède un puissant outil d'import de notice au catalogage. Via Koha vous pouvez vous connecter à tout serveur Z39.50 accessible publiquement ou pour lequel vous avez les droits de connexion.

Koha est installé avec une liste par défaut de serveurs Z39.50 que vous pouvez compléter, modifier ou supprimer.

Pour trouver des serveurs additionnels vous pouvez utiliser IndexData's IRSpy: <http://irspy.indexdata.com/find.html>

---

##### [1.6.2.1. Ajouter un serveur Z39.50](#)

A partir de la page Serveurs Z39.50, cliquez 'Ajouter serveur Z39.50'

Identifiant et Mot de passe sont nécessaires uniquement pour les serveurs protégés par mot de passe

---

##### [1.6.2.2. Quelques serveurs](#)

Quelques serveurs Z39.50 :

BNF z3950.bnf.fr:2211 TOUT

SUDOC carmin.sudoc.abes.fr:10646 abes-z39-public

Les serveurs suivants sont utilisÃ©s par d'autres bibliothÃ©ques avec Koha (en AmÃ©rique) :

BIBLIOS z3950.biblios.net:210 bibliographic

BIG COUNTRY KOHA bcls.kohalibrary.com:210 bcls\_koha

CUYAHOGA COUNTY PUBLIC webcat.cuyahoga.lib.oh.us:210 INNOPAC

GREATER SUDBURY PUBLIC 216.223.90.51:210 INNOPAC

HALIFAX PUBLIC catalogue.halifaxpubliclibraries.ca:210 horizon

HALTON HILLS PUBLIC cat.hhpl.on.ca:210 halton\_hills

LIBRARY OF CONGRESS z3950.loc.gov:7090 Voyager

LONDON PUBLIC LIBRARY catalogue.londonpubliclibrary.ca:210 INNOPAC

MANITOBA PUBLIC library.gov.mb.ca:210 horizon

MILTON PL cat.mpl.on.ca:210 horizon

NATIONAL LIBRARY OF WALES cat.llgc.org.uk:210 default

TORONTO PUBLIC symphony.torontopubliclibrary.ca:2200 unicorn

TRI-UNI 129.97.129.194:7090 voyager

VANCOUVER PUBLIC LIBRARY z3950.vpl.ca:210 Horizon

---

## Chapter 2. Outils

---

### 2.1. Nouvelles

L'outil 'Nouvelles' permet aux bibliothÃ©caires de poster des nouvelles Ã l'OPAC et en interface professionnelle.

Pour ajouter des nouvelles soit Ã l'OPAC soit en interface professionnelle :

Cliquez 'Ajouter entrÃ©e'

Dans 'AffichÃ© sur' choisissez de publier la nouvelle soit Ã l'OPAC soit sur l'interface bibliothÃ©caire.

Saisissez un titre pour la nouvelle

GrÃ¢ce aux champs Date de publication et Date d'expiration vous pouvez dÃ©terminer la durÃ©e de visibilitÃ© de la nouvelle

'S'affiche en position' vous permet de dÃ©cider l'ordre d'affichage des nouvelles

Le champ 'Nouvelle' contient le texte de la nouvelle et vous permet l'usage de HTML pour la mettre en forme

AprÃ©s avoir rempli les champs, cliquez 'Valider'

Les nouvelles Ã l'OPAC apparaissent au-dessus de [OpacMainUserBlock](#)

Les nouvelles en interface professionnelle apparaissent tout Ã gauche de l'Ã©cran.

---

### 2.2. CrÃ©ateur d'Ã©tiquettes

---

### 2.3. Cr ateur rapide d' tiquette de couverture

Pour utiliser cet outil vous n'avez besoin que du code barre du livre pour lequel vous souhaitez imprimer une  tiquette pour la tranche.

D finissez les champs que vous voulez imprimer sur l' tiquette dans la pr f rence syst me SpineLabelFormat system preference

*Aller dans:* Plus > Administration > Pr f rences syst me > Catalogage > SpineLabelFormat

Formatez votre impression en  ditant spinelabel.css qui se trouve dans koha-tmpl/intranet-tmpl/prog/en/css/

---

### 2.4. Patron Card Creator

---

### 2.5. Calendrier

Les biblioth ques peuvent d finir les jours de fermeture et les vacances   prendre en compte dans le calcul des dates de retour. Vous pouvez utiliser le Calendrier de la fa on souhait e en activant les pr f rences syst me appropri es :

*Aller dans :* Plus > Administration > Pr f rences syst me > Circulation > [useDaysMode](#)

Choisissez la fa on de calculer les dates de retour - soit inclure les jours de fermeture de la biblioth que dans le calcul, ou ne pas les inclure

*Aller dans :* Plus > Administration > Pr f rences syst me > Circulation > [finescalendar](#)

Ceci v rifiera les dates de vacances avant de calculer les amendes

---

#### 2.5.1. Ajouter des  v nements

Avant d'ajouter des  v nements; choisissez le site auquel vont s'appliquer les fermetures. Lors de l'ajout d'un  v nement vous pourrez choisir si vous souhaitez appliquer cette fermeture   un seul site ou   tous les sites. Pour ajouter une fermeture, simplement :

Cliquez dans le calendrier sur la date   laquelle vous voulez appliquer la fermeture

Dans le formulaire qui appara t au-dessus du calendrier, saisissez les informations relatives   la fermeture

Le Site est rempli automatiquement   partir de la biblioth que que vous avez choisie dans le menu d roulant en haut de page

Le nom du jour est  galement rempli automatiquement   partir du jour cliqu  sur le calendrier

Dans la description saisissez la raison pour laquelle le site est ferm 

Ensuite vous pouvez choisir si ce jour ferm  est unique ou r p t 

Enfin d cidez si ce jour ferm  s'applique   toutes les biblioth ques ou uniquement   celle que vous avez pr c demment choisie

Apr s avoir enregistr  vous voyez l' v nement list  dans le r capitulatif en-dessous du calendrier.

---

#### 2.5.2. Modifier des fermetures

Pour modifier un  v nement :

Cliquez sur le jour que vous voulez modifier dans le calendrier (en cliquant la date dans le calendrier, pas dans le r capitulatif)

A partir de ce formulaire vous pouvez modifier ce jour de fermeture ou le supprimer compl tement. Ces deux actions n cessitent que vous cliquiez le bouton 'Enregistrer' pour prendre en compte les changements.

Cliquer sur des jours de fermeture r p tables propose des options l galement diff rentes :

Dans le formulaire ci-dessus vous remarquez qu'il y a maintenant une option 'Cr er une exception   ce jour de fermeture' ; choisir cette option vous permet d'indiquer que ce jour n'est pas ferm  alors que la biblioth que est ordinairement ferm e   cette date.

---

### [2.5.3. Aide additionnelle](#)

À l'ajout ou modification d'un élément vous pouvez obtenir une aide en cliquant le signe plus bleu à côté des différentes options du formulaire.

---

### [2.6. Commentaires](#)

Tous les commentaires ajoutés par les lecteurs aux notices bibliographiques à l'OPAC requièrent une modération par la bibliothèque. Pour modifier un commentaire cliquez simplement 'Approuver' ou 'Supprimer' à droite du commentaire en attente de modération.

Si il n'y a pas de commentaire à modifier, vous verrez un message disant juste :

---

### [2.7. Tag Moderation](#)

En fonction des [préférences système pour les tags](#), les bibliothécaires peuvent avoir besoin d'approuver les tags avant qu'ils soient publiés à l'OPAC. Ceci est fait via l'outil Tags.

La première fois que vous allez sur cette page, vous avez accès à une liste de tags en attente d'approbation ou de rejet par la bibliothèque.

Pour approuver un tag, vous pouvez soit cliquer le bouton 'Approuver' au niveau du terme, soit cocher tous les termes que vous souhaitez approuver et cliquer 'Approuver' en-dessous de la table.

Pour rejeter un tag, vous pouvez soit cliquer le bouton 'Rejeter' au niveau du terme, soit cocher tous les termes que vous souhaitez rejeter et cliquer 'Rejeter' en-dessous de la table.

Une fois qu'un tag a été approuvé ou rejeté, il sera déplacé dans la liste de tags appropriée. Un résumé de tous les tags est visible sur la droite de l'écran.

Même une fois approuvé ou rejeté, un tag peut toujours être déplacé vers une autre liste. En regardant la liste des tags approuvés, chaque tag a la possibilité d'être rejeté :

Pour vérifier si un terme est dans la liste 'approuvé' ou 'rejeté' (et éventuellement dans le [dictionnaire](#) que vous avez ajouté pour la modération des tags), entrez simplement le terme dans le formulaire de recherche à droite de l'écran pour voir le statut du tag.

---

### [2.8. Profils CVS](#)

Les profils CSV sont créés afin de définir comment vous souhaitez exporter votre panier ou liste.

---

#### [2.8.1. Ajouter des profils CSV](#)

Pour ajouter un profil CSV

Cliquez 'Profils CSV' à partir du menu Outils

Le 'Nom du profil' apparaîtra dans le menu déroulant Format lorsque vous aurez choisi 'Télécharger' à partir du panier ou d'une liste.

La 'Description du profil' est juste une information concernant le profil

Choisissez ensuite les séparateurs souhaités pour le fichier CSV :

séparateur CSV : pour séparer les colonnes du fichier

séparateur de champ : sépare deux champs séparés à l'intérieur d'une colonne

séparateur de sous-champ : sépare deux sous-champs séparés à l'intérieur d'un champ

Enfin finalisez votre fichier CSV en utilisant le champ 'champs marc'

Terminez les champs et sous-champs que vous souhaitez exporter, séparés par des pipes. Vous pouvez indiquer le titre de la colonne à ce niveau en le saisissant avant le champ, suivi du signe égal. Exemple : Titre=200a|Editeur=210|Sujet=610a|300

---

#### [2.8.2. Modifier les profils CSV](#)

Une fois que vous avez créé au moins un profil CSV une option 'Modifier ou supprimer un profil CSV' apparaîtra en-dessous du formulaire d'ajout.

Choisissez le profil à éditer et modifiez les champs nécessaires.

Pour supprimer un profil, cochez l'option 'Supprimer le profil sélectionné' avant de cliquer 'Envoyer'

---

### **2.8.3. Utiliser les profils CSV**

Vos profils CSV apparaîtront dans la liste des formats à l'export du panier ou d'une liste après avoir cliqué le lien ou le bouton 'Télécharger'.

---

## **2.9. Rotating Collections**

---

### **2.10. Préparation des notices MARC à l'import**

L'import de notices dans Koha nécessite en deux étapes. La première est la préparation des notices pour l'import.

D'abord recherchez le fichier MARC sur votre ordinateur

Ensuite vous aurez accès à des options pour la recherche de doublons et l'import des exemplaires.

Remplissez 'Notes à propos de ce fichier' pour repérer votre chargement lorsque vous irez dans l'outil 'Gérer les notices MARC traitées'

Choisissez le format des données

Choisissez si vous souhaitez ou non rechercher des notices existantes

Vous pouvez définir des [règles de concordance](#) dans le module Administration

Ensuite choisissez quoi faire avec les notices qui concordent s'il y en a

Enfin choisissez que faire avec les notices qui sont uniques

Ensuite vous pouvez choisir d'importer ou non les données d'exemplaires trouvées dans les notices MARC

Cliquez 'Traiter pour import'

Vous aurez accès à une confirmation de votre import

Pour poursuivre le processus allez dans l'outil [Gérer les notices MARC traitées](#)

---

### **2.11. Gestion des notices MARC traitées**

Une fois que vous avez préparé vos notices pour l'import vous pouvez finir l'import en utilisant cet outil.

A partir de la liste des notices traitées, cliquez sur le nom de fichier pour lequel vous voulez terminer l'import.

Remarquez que les notices qui ont déjà été importées ont un 'Etat' importé

Un récapitulatif de votre import apparaîtra avec la possibilité de changer les règles de concordance.

En-dessous de ce récapitulatif se trouve la liste des notices qui seront importées

Vérifiez le récapitulatif avant de terminer l'import afin de vous assurer que vos règles de concordance fonctionnent et que les notices apparaissent bien de la façon dont vous les attendez

Cliquez 'Importer dans le catalogue' pour terminer l'import

Une fois que votre import est terminé un lien vers les nouvelles notices apparaîtra à droite de chaque titre importé

Vous pouvez aussi annuler votre import en cliquant le bouton 'Annuler l'import de notices dans le catalogue'

Les notices importées en utilisant cet outil restent dans le 'Réservoir' jusqu'à ce qu'elles soient supprimées. Ces documents apparaissent lors d'une recherche dans le catalogue à partir du module [Catalogage](#) :

Pour supprimer les documents du 'Réservoir'

Allez sur la page principale de l'outil Gestion des notices MARC traitées

Pour supprimer un lot, cliquez le bouton "Clean" sur la droite

Un message de confirmation s'affiche

Acceptez la suppression, les notices seront enlevées du réservoir et l'état sera modifié en 'nettoyé'

---

## 2.12. Exportation notices biblio et exemplaires

Koha possède un outil qui vous permet d'exporter les données bibliographiques et/ou d'exemplaires par lot. Ceci peut être utilisé pour fournir vos notices à d'autres bibliothèques, organisations ou services ; ou simplement dans un but de sauvegarde .

Remplissez le formulaire de façon à limiter votre export à une certaine tranche (tous les champs sont optionnels)

Choisissez de limiter votre export selon une ou plusieurs des options suivantes

Limiter à une tranche de numéros de notices

Limiter à un type de document spécifique

Limiter à une bibliothèque particulière

Limiter à une tranche de cotes

Limiter à une période d'acquisition

Ensuite choisissez les informations à ignorer

Par défaut les exemplaires seront exportés, si vous souhaitez n'exporter que les données bibliographiques, cochez la case 'Ne pas exporter les exemplaires'

Pour limiter votre export aux exemplaires de la bibliothèque à laquelle vous êtes connecté (si vous avez laissé le champ 'Site' sur 'Tout') ou à la bibliothèque sélectionnée plus haut, cochez la case 'Enlever les exemplaires non locaux'

Vous pouvez aussi choisir les champs que vous ne voulez pas exporter. Ceci peut être pratique si vous partagez vos données, vous pouvez enlever tous les champs locaux avant de fournir vos données à une autre bibliothèque.

Enfin choisissez le format du fichier et le nom du fichier

Choisissez d'exporter vos données au format marc ou marcxml

Choisissez le nom de votre fichier

Cliquez 'Exportation'

---

## 2.13. Importation des données adhérents

L'outil d'import des lecteurs peut être utilisé n'importe quand pour ajouter des adhérents par lot. C'est communément utilisé dans les universités et les écoles lorsqu'un nouveau groupe d'étudiants s'inscrit.

---

### 2.13.1. Créer le fichier adhérents

L'installation de Koha comporte un fichier CSV blanc que vous pouvez utiliser comme modèle pour vos données adhérents. Si vous préférez créer le fichier vous-même, assurez-vous que vos champs correspondent à l'ordre suivant :

borrowernumber, cardnumber, surname, firstname, title, othernames, initials, streetnumber, streettype, address, address2, city, zipcode, country, email, phone, mobile, fax, emailpro, phonepro, B\_streetnumber, B\_streettype, B\_address, B\_address2, B\_city, B\_zipcode, B\_country, B\_email, B\_phone, dateofbirth,

branchcode, categorycode, dateenrolled, dateexpiry, gonenoaddress, lost, debarred, contactname, contactfirstname, contacttitle, guarantorid, borrowernotes, relationship, ethnicity, ethnoses, sex, password, flags, userid, opacnote, contactnote, sort1, sort2, altcontactfirstname, altcontactsurname, altcontactaddress1, altcontactaddress2, altcontactaddress3, altcontactzipcode, altcontactcountry, altcontactphone, smsalernumber, patron\_attributes

La valeur du 'password' doit être entrée en plein texte, et sera convertie en somme md5 (qui est une version cryptée du mot de passe).

Si vos mots de passe sont déjà cryptés, voyez avec votre administrateur système pour les solutions  
Les formats de date doivent correspondre à votre préférence système [dateformat](#), et doivent être complétés avec des zéros, i.e. '01/02/2008'.  
Les champs 'branchcode' et 'categorycode' sont obligatoires et doivent correspondre à des entrées valides de votre base de données  
Si vous chargez des [attributs adhérents](#), le champ 'patron\_attributes' doit contenir une liste des types d'attribut:valeurs séparés par des virgules

Le code du type d'attribut et un ':' doivent précéder chaque valeur

Par exemple: "INSTID:12345,LANG:fr"

Si vous entrez plus d'un attribut adhérent, veuillez mettre les informations entre guillemets (comme montré ci-dessus)  
De façon optionnelle vous pouvez ajouter une ligne d'entêtes, permettant de voir quelles colonnes sont remplies dans le fichier d'import

---

### 2.13.2. Importer les adhérents

Une fois que vous avez créé votre fichier, vous pouvez utiliser l'outil Importation des données adhérents pour charger les données dans Koha.

Choisissez votre fichier CSV et choisissez de tester la concordance sur le 'Numéro de carte' pour éviter d'ajouter des numéros de carte en doublon dans le système

Ensuite vous pouvez choisir d'appliquer des valeurs par défaut à tous les adhérents que vous importez

ex. Si vous importez des adhérents spécifiquement dans une branche vous pouvez utiliser le champ du formulaire d'import pour appliquer le branchcode à tous les comptes que vous importez.

Enfin vous devez décider que faire dans le cas de doublons.

Une notice doublon est détectée en utilisant le champ que vous avez choisi comme concordance

Si vous incluez des attributs adhérent dans votre fichier vous pouvez décider si vous ajoutez vos valeurs aux valeurs existantes ou si vous effacez les valeurs existantes pour ne garder que les nouvelles.

---

### 2.14. Adhérents (rendre anonyme et supprimer)

Cet outil vous permet de façon massive les historiques de circulation (ceci signifie que vous conservez les informations du nombre de fois où un exemplaire a été prêté - mais pas celles concernant les lecteurs qui ont emprunté les documents) ou de supprimer les adhérents par lot (les supprimer définitivement du système).

Pour anonymiser ou supprimer des adhérents

Cochez l'action que vous souhaitez exécuter (Supprimer ou Rendre anonyme)

Saisissez une date avant laquelle vous souhaitez modifier les données

Cliquez 'Suivant'

Un message de confirmation apparaît vous demandant si vous êtes sûr que c'est bien ce que vous voulez faire

Cliquez 'Terminer' va supprimer ou rendre anonyme vos données

---

### 2.15. Chargement de photos d'adhérents

Des photos des adhérents peuvent être chargées par lot si vous avez permis l'attachement de [photographies d'adhérents](#) aux fiches lecteurs.

Créer un fichier texte et appelez-le "DATALINK.TXT" ou "IDLINK.TXT"

Sur chaque ligne du fichier saisissez le numéro de carte adhérent suivi d'une virgule (ou d'une tabulation) et du nom du fichier image

Assurez-vous que votre fichier TXT est un document texte brut, pas RTF.

Compressez les fichiers texte et les fichiers image

Allez dans l'outil Chargement de photos d'adhérents

Pour une seule photo, sélectionnez simplement le fichier image et saisissez le numéro de carte de l'adhérent

Pour plusieurs photos, choisissez de charger un fichier zip

Après le chargement vous aurez un message de confirmation

Il y a une limite à 100K pour la taille des images chargées, et il est recommandé que les images aient une taille 120x200 pixels, mais de plus petites photos sont possibles également.

---

## **2.16. Planificateur de tâches**

Le planificateur de tâches permet de programmer l'exécution de rapports quand vous voulez

Pour programmer une tâche, allez dans le Planificateur de tâches et remplissez le formulaire

L'heure du serveur montre l'heure sur votre serveur (programmez tous vos rapports pour s'exécuter en fonction de cette heure - pas sur votre heure locale)

L'heure doit être saisie sous la forme hh:mm (2 chiffres pour l'heure, 2 chiffres pour les minutes)

La date doit être entrée à l'aide du popup calendrier

Choisissez le rapport à programmer dans la liste des rapports

Choisissez si vous souhaitez recevoir le texte ou un lien vers les résultats

Dans le champ Email saisissez l'adresse mail de la personne qui recevra le rapport

En-dessous du formulaire de planification des tâches, se trouve une liste des rapports programmés

Vous pouvez aussi programmer des rapports directement à partir de la liste des rapports sauvegardés en cliquant le lien 'Planifier'

---

### **2.16.1. Résolution de problèmes**

Le planificateur de tâches ne fonctionnera pas si l'utilisateur avec lequel tourne le serveur web n'a pas la permission de l'utiliser. Pour voir si l'utilisateur en question a les permissions nécessaires, vérifiez /etc/at.allow pour voir quels sont les utilisateurs présents dedans. Si vous n'avez pas ce fichier, vérifiez /etc/at.deny. Si at.deny existe mais est vide, alors tout utilisateur peut l'utiliser. Voyez avec votre administrateur système pour ajouter l'utilisateur au bon endroit pour que le planificateur de tâches fonctionne.

---

## **2.17. Messages**

Tous les messages envoyés par Koha peuvent être personnalisés en utilisant l'outil Messages. Plusieurs modèles prédéfinis sont installés dans Koha, qui sont visibles lorsque vous allez la première fois dans l'outil Messages.

Chaque message peut être modifié, mais seuls quelques uns peuvent être supprimés, ceci afin d'éviter les erreurs système si une notification devait être envoyée sans modèle associé.

---

### **2.17.1. Ajouter des messages**

Pour ajouter un nouveau message

Cliquez 'Ajouter notification'

Choisissez le module auquel cette notification est rattachée

Le Code est limité à 20 caractères

Utilisez le champ Nom pour préciser plus d'information

Le Sujet du message est ce qui apparaîtra dans le sujet du mail

Dans le Corps du message tapez le message qui vous convient, utilisez les champs sur la gauche pour entrer les données individuelles à partir de la base de données.

Pour les messages de retard (pour la circulation), assurez-vous d'utiliser <<items.content>> pour obtenir les données concernant tous les documents en retard, plutôt que <<biblio.title>> et <<biblio.author>>.

---

### 2.17.2. Messages existants

Parmi les messages par défaut il y a des messages pour plusieurs actions fréquentes dans Koha, voici un exemple de ce que ces messages font

ACCLAIM (Réclamation acquisitions)

Utilisé dans le module de réclamation des acquisitions

*Allez dans* : Plus > Acquisitions > Commandes en retard

HOLD (Réservations mises de côté)

Ce message est utilisé si deux conditions sont remplies :

La préférence EnhancedMessagingPreferences est activée (ON)

*Allez dans* : Plus > Administration > Préférences système > Adhérents > [EnhancedMessagingPreferences](#)

L'adhérent a demandé à recevoir cette notification

*Aller dans* : OPAC > Login > Mes notifications

*Aller dans* : Interface professionnelle > Fiche adhérent > Notifications

ODUE (Message de retard)

Ce message est utilisé pour envoyer des notifications de retard aux adhérents

Voir un [Exemple de message de retard](#)

Nécessite que vous paramétriez le [Déclencheur de notification](#)

RLIST (Liste de circulation)

Utilisé dans le module Périodiques pour notifier les adhérents / les professionnels de la parution d'un nouveau numéro de périodique

*Allez dans* : Plus > Périodiques > Nouvel abonnement

Vous avez la possibilité de choisir le message 'Liste de circulation' à la création d'un nouvel abonnement (Choix à partir du menu déroulant 'Notifications de l'adhérent').

Notez aussi que si vous souhaitez notifier les lecteurs de la parution d'un nouveau numéro de périodique, vous pouvez cliquer sur 'définir un message', ce qui vous amène à l'outil 'Messages'

---

### 2.18. Déclencheur de notification

Afin d'envoyer les messages de retard que vous avez définis dans l'outil Messages, vous devez d'abord paramétrer le déclencheur de notifications pour avoir ces messages.

Afin que des messages de retard puissent être envoyés à vos adhérents, vous devez [paramétrer les catégories adhérent](#) pour qu'elles puissent recevoir des messages de retard.

L'outil Déclencheur de notification donne la possibilité au bibliothécaire d'envoyer jusqu'à trois messages pour chaque type d'adhérent les notifiant de documents en retard.

Le délai est le nombre de jours de retard avant qu'une action soit programmée.

Si vous souhaitez que Koha programme une action (envoyer un message ou suspendre un lecteur), une valeur pour le délai est nécessaire.

Pour envoyer des messages additionnels, cliquez sur les onglets pour un 'Deuxième' et 'Troisième' message

Si vous souhaitez empêcher vos adhérents d'emprunter des documents en raison de leurs documents en retard, cochez la case 'Suspendu' ; ceci affichera un message sur la fiche adhérent lors du prêt informant le bibliothécaire que le lecteur ne peut pas emprunter à cause de documents en retard.

Voir un [Exemple de message de retard](#)

---

## 2.19. Visualiseur des logs

Les actions dans Koha sont tracées dans des fichiers de log. Vos [préférences système](#) peuvent être modifiées pour empêcher les logs pour différentes actions. Les logs peuvent être consultés grâce à l'outil Visualiseur des logs.

Choisir différents critères parmi les options fournira le fichier de log correspondant à cette requête

Notez que les noms n'apparaissent pas dans le log, uniquement les numéros identifiants. De même, vous devez utiliser ces numéros identifiants lorsque vous recherchez dans les logs.

---

## 2.20. Inventaire / Recolement

L'outil Inventaire de Koha peut être utilisé de deux façons, l'une en sortant une liste à partir de laquelle vous pouvez marquer les exemplaires, l'autre en chargeant un fichier texte de codes barres collectés à l'aide d'un lecteur de codes barres portable.

Si vous n'avez pas la possibilité d'utiliser votre lecteur de codes barres partout dans la bibliothèque, la première option disponible pour vous est de générer une liste basée sur des critères que vous définissez.

Choisissez quelle bibliothèque, quelle localisation, intervalle de cotes, statut d'exemplaire, et date à laquelle l'exemplaire a été vu pour la dernière fois, pour générer une liste de documents que vous pouvez ensuite imprimer et utiliser dans les rayons de votre bibliothèque pour vérifier votre collection.

De façon alternative vous pouvez exporter la liste vers un fichier CSV pour modification dans une application sur votre poste de travail. Cochez simplement la case 'Exporter vers fichier csv' pour générer ce fichier.

Une fois que vous avez trouvé les exemplaires sur les étiquettes vous pouvez retourner sur la liste et cocher les exemplaires que vous avez trouvés, afin que le système mette à jour la date 'Pas vu depuis' à la date du jour.

Si vous avez un lecteur de codes barres (ou un ordinateur portable et une douchette USB) vous pouvez vous déplacer dans la bibliothèque et scanner les codes barres au fur et à mesure. Lorsque vous avez terminé vous pouvez charger dans Koha le fichier texte ainsi créé.

Choisissez le fichier texte et la date avec laquelle vous souhaitez marquer les exemplaires comme 'vus', et cliquez 'Valider'.

---

## 2.21. Modifier un lot d'exemplaires

---

## 2.22. Supprimer un lot d'exemplaires

Cet outil vous permet de supprimer un lot d'exemplaires de Koha.

A partir de cet outil vous pouvez choisir de charger un fichier de codes barres ou d'id d'exemplaires, ou vous pouvez scanner les codes barres un par un dans la zone en-dessous de l'outil de chargement de fichier. Une fois que vous avez chargé le fichier ou fait la liste de codes barres, vous pouvez cliquer 'Suivant'

Un écran de confirmation s'affiche. A partir de là vous pouvez décocher les exemplaires que vous ne souhaitez pas supprimer, avant de cliquer 'Valider'. Si les exemplaires sont en prêt un message d'erreur s'affiche après avoir cliqué 'Valider' et les exemplaires ne sont pas supprimés.

Si les exemplaires peuvent être supprimés ils le seront, et une confirmation de la suppression s'affiche.

---

## Chapter 3. Adhérents

Avant d'importer et/ou d'ajouter des adhérents, assurez-vous d'avoir configuré vos [catégories adhérents](#).

---

### 3.1. Ajouter un nouvel adhérent

Les adhérents sont ajoutés en allant dans le module 'Adhérents'.

Cliquer 'Ajouter'

Saisissez d'abord les informations d'identification concernant votre lecteur

Les champs obligatoires sont définies dans la référence système [BorrowerMandatoryField](#)

Saisissez ensuite les informations de contact

Si ce lecteur est de type enfant, Koha vous propose de rattacher le lecteur enfant à un lecteur adulte

Cliquez 'Adhérent' pour rechercher un adhérent existant dans le système

Si le garant n'est pas dans le système, vous pouvez saisir le nom et le prénom dans les champs proposés

Les relations sont paramétrées en utilisant la référence système [borrowerRelationship](#)

Si ce lecteur est de type Professionnel, Koha vous propose de rattacher le lecteur à un lecteur Collectivité

Cliquez 'Adhérent' pour rechercher un adhérent collectivité existant dans le système

Chaque adhérent peut avoir un autre contact

Un autre contact peut être un parent ou un tuteur. Ceci peut également être utilisé dans un contexte universitaire pour enregistrer l'adresse des parents des adhérents étudiants.

La section Elements de gestion inclue des informations utilisées en interne par la bibliothèque

Le champ Numéro de carte est calculé automatiquement si vous avez paramétré la référence système [autoMemberNum](#) pour faire ainsi

Si vous avez choisi une mauvaise catégorie d'adhérent au début vous pouvez la modifier ici

Critères 1 et 2 sont utilisés pour obtenir des statistiques par la bibliothèque

Ensuite, la section Choix bibliothèque ajoute des informations additionnelles concernant la bibliothèque

La Date d'inscription est remplie automatiquement à la date du jour

Si votre carte lecteur expire (en fonction du paramétrage des [catégories adhérent](#)) la Date d'expiration est calculée automatiquement

La Note OPAC est une note pour le lecteur - elle apparaît à l'OPAC sur la fiche lecteur

La Note de circulation est destinée à l'équipe de la bibliothèque et apparaît lorsque la bibliothèque va faire un prêt pour ce lecteur.

Les Identifiant OPAC et Mot de passe sont utilisés par les adhérents pour se connecter à leur compte à l'OPAC. Ils sont également utilisés par les bibliothécaires pour leur accès à l'interface professionnelle.

Si vous avez activé des [attributs adhérents](#) supplémentaires, ceux-ci apparaissent ensuite

Enfin vous pouvez choisir des préférences de notification pour ce lecteur.

Ces préférences vont écarter celles que vous avez définies au niveau des [catégories adhérent](#)

Ces préférences peuvent être modifiées par le lecteur via l'OPAC

---

### **3.2. Ajouter un adhérent professionnel de la bibliothèque**

Tous les membres de l'équipe de la bibliothèque doivent être entrés dans Koha comme adhérents du type 'Bibliothécaire'. Pour ajouter un adhérent professionnel, suivez les étapes décrites dans [Ajouter un nouvel adhérent](#). Pour donner aux membres de l'équipe les permissions d'accès à l'interface professionnelle, suivez les étapes décrites dans [Permissions Adhérents](#)

Pensez bien à attribuer à l'équipe des identifiants et mots de passe sécurisés, puisqu'ils seront utilisés pour se connecter à l'interface professionnelle.

---

### 3.3. Ajouter un adhérent Statistiques

Pour comptabiliser les communications sur place des documents vous pouvez avoir besoin d'un adhérent de type de catégorie Statistiques. D'abord vous aurez besoin d'une [catégorie adhérent](#) définie pour vos adhérents Statistiques.

Ensuite vous allez créer un nouveau lecteur de cette catégorie statistique.

Ensuite, suivez les étapes décrites précédemment dans la section '[Ajouter un nouvel adhérent](#)' de ce manuel. Comme ce lecteur n'est pas une personne réelle, remplissez uniquement les champs obligatoires, les informations relatives à la bibliothèque, et rien d'autre.

---

### 3.4. Modifier les adhérents

Dans Koha les lecteurs peuvent être modifiés à partir de l'un des boutons ou liens Modifier existants.

Pour modifier la totalité de la fiche adhérent cliquez simplement le bouton 'Modifier' au-dessus de la fiche adhérent.

Pour modifier uniquement le mot de passe adhérent, cliquez le bouton 'Changer mot de passe'.

Les mots de passe adhérents sont cryptés et ne peuvent pas être retrouvés par l'équipe de la bibliothèque

Le formulaire génère automatiquement un mot de passe aléatoire, ce mot de passe n'est pas le mot de passe actuel de l'adhérent, mais juste un nouveau mot de passe aléatoire

Pour modifier une section spécifique de la fiche adhérent (par exemple la section Utilisation de la bibliothèque) cliquez le lien 'Modifier' en-dessous de cette section

Une photographie de l'adhérent peut être ajoutée en recherchant l'image sur votre ordinateur à partir de la section 'Télécharger les photos adhérents'

Ce formulaire n'apparaît pas si vous n'avez pas paramétré la préférence système [patronimages](#) pour autoriser les photos des adhérents

Pour ajouter les photos des adhérents par lot, utilisez l'outil [Chargement photos adhérents](#)

Les lecteurs peuvent également être interdits de prêt en positionnant les Piages du compte adhérent

Si vous souhaitez que votre équipe confirme l'adresse d'un adhérent avant de lui faire des prêts, vous pouvez positionner le piage 'Parti sans laisser d'adresse'

Si vous voulez suspendre un adhérent vous pouvez activer le piage 'Suspendu', et éventuellement indiquer jusqu'à quelle date il est suspendu, et la raison de la suspension

Ce blocage peut être positionné automatiquement par l'application des règles de retard (jours de suspension) ou par l'outil [Déclencheur de notification](#)

Si un adhérent vous informe qu'il a perdu sa carte vous pouvez activer le blocage 'Carte perdue' pour éviter que quelqu'un d'autre n'utilise cette carte pour emprunter

---

### 3.5. Permissions adhérent

Les permissions adhérents sont utilisées pour permettre aux professionnels d'avoir accès à l'interface professionnelle.

Pour que les membres de la bibliothèque puissent se connecter à l'interface professionnelle, ils doivent avoir (au moins) la permission 'catalogue' qui leur permet de voir l'interface professionnelle.

---

#### 3.5.1. Définir les Permissions Adhérent

Pour définir les permissions d'un adhérent, vous devez d'abord avoir un lecteur qui a la droit de le faire.

Sur la fiche adhérent cliquez Plus et choisissez Définir permissions pour modifier les permissions adhérent.

En fonction du paramétrage de la préférence système GranularPermissions vous pourrez voir l'un ou l'autre des menus ci-dessous :

Si GranularPermissions est positionné sur 'the general module' vous verrez les permissions basées sur les différents modules de Koha, de façon globale

Si GranularPermissions est positionné sur 'the specific page' vous verrez des permissions plus granulaires, pour les fonctionnalités à l'intérieur des modules

---

### **3.5.2. Détail des permissions adhérent**

#### superlibrarian

Accède à toutes les fonctions de l'interface professionnelle, sans limite

#### circulate

Prêter et rendre des documents et avoir accès au module Circulation de l'interface professionnelle

Avec la préférence GranularPermissions positionnée sur page spécifique cette section peut être détaillée ([En savoir plus](#))

#### catalogue

Allows staff members to search the catalog via the staff client

Must be given to all staff members to allow them to login to the staff client

#### parameters

Provides access to all areas of the Administration menu

#### borrowers

Allows staff members to add or modify patrons (with the exception of setting permissions)

#### permissions

Ability to set patron permissions

#### reserveforothers

Ability to place holds on books for patrons via the staff interface

#### borrow

Grants staff members the rights to borrow books from the library

#### editcatalogue

Ability to catalog items (add and edit bibliographic and holdings data)

With GranularPermissions is set to 'the individual modules' this section will be expanded ([Learn more](#))

#### updatecharges

Manage patron accounts (including paying fines, adding credits, and creating invoices)

#### acquisition

Provides access to the acquisitions and patron purchase suggestion modules

With GranularPermissions is set to 'the individual modules' this section will be expanded ([Learn more](#))

#### management

No longer in use

#### tools

Access to all items in the Tools section of the staff client

With GranularPermissions is set to 'the individual modules' this section will be expanded ([Learn more](#))

#### editauthorities

Provides access to edit the authority record

#### serials

Allows access to the serials module

#### reports

Allow access to the Reports module (ability to create, edit and run all reports)

Reports found on the Circulation page are not controlled by this permission

With GranularPermissions is set to 'the individual modules' this section will be expanded ([Learn more](#))

#### staffaccess

Provides the ability to modify login / permissions for staff users

---

### **[3.5.2.1. Granular Circulate Permissions](#)**

If the staff member has 'circulate' permissions they have the ability to perform all of these actions. If you would like to control circulation permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

#### circulate\_remaining\_permissions

All circulation rights except override permissions

#### override\_renewals

Override blocked renewals

---

### **[3.5.2.2. Granular Cataloging Permissions](#)**

If the staff member has 'editcatalogue' permissions they have the ability to perform all of these actions. If you would like to control cataloging permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

#### edit\_catalogue

Ability to access all cataloging functions via the [Cataloging](#) page

#### fast\_cataloging

The ability to catalog using only the [Fast Add Framework](#) found on the [Circulation](#) page

---

### **[3.5.2.3. Granular Acquisitions Permissions](#)**

If the staff member has 'acquisition' permissions they have the ability to perform all of these actions. If you would like to control acquisitions permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

#### budget\_add\_del

Ability to add and delete budgets (not modify)

budget\_manage

Manage budgets

budget\_modify

Ability to edit existing budgets (not to add or delete)

contracts\_manage

Manage contracts

group\_manage

Manage orders and basket groups

order\_manage

Manage orders and baskets

order\_receive

Manage orders and baskets

period\_manage

Manage periods

planning\_manage

Manage budget plannings

vendors\_manage

Manage vendors

---

#### **3.5.2.4. Granular Tools Permissions**

If the staff member has 'tools' permissions they have the ability to access and use all items under the Tools menu. If you would like to control which tools staff members have access to on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

batch\_upload\_patron\_images

Upload patron images in batch or one at a time (Access to the [Image Upload Tool](#))

batchdel

Batch delete items from Koha (Access to the [Modify a queryset of items Tool](#))

batchmod

Batch modify items in Koha (Access to the [Delete a queryset of items Tool](#))

delete\_anonymize\_patrons

Delete old borrowers and anonymize circulation/reading history (Access to the [Anonymize Patron Tool](#))

edit\_calendar

Define days when the library is closed (Access to the [Calendar/Holidays Tool](#))

edit\_news

Write news for the OPAC and staff interfaces (Access to the [News Tool](#))

edit\_notice\_status\_triggers

Set notice/status triggers for overdue items (Access to the [Overdue Notice Status/Triggers Tool](#))

edit\_notices

Define notices (Access to the [Notices Tool](#))

export\_catalog

Export bibliographic and holdings data (Access to the [Export Bibliographic & Holdings Data Tool](#))

import\_patrons

Import patron data (Access to the [Import Patrons Tool](#))

inventory

Perform inventory (stocktaking) of your catalog (Access to the [Inventory Tool](#))

label\_creator

Create printable labels and barcodes from catalog and patron data (Access to the [Label Creator](#) and [Quick Label Creator](#) Tools)

manage\_csv\_profiles

Create and edit CSV profiles (Access to the [CSV Profiles Tool](#))

manage\_staged\_marc

Managed staged MARC records, including completing and reversing imports (Access to the [Manage Staged MARC Records Tool](#))

moderate\_comments

Moderate patron comments (Access to the [Comments](#) and [Tags](#) Tools)

schedule\_tasks

Schedule tasks to run (Access to the [Task Scheduler Tool](#))

stage\_marc\_import

Stage MARC records into the reservoir (Access to the [Stage MARC Records Tool](#))

view\_system\_logs

Browse the system logs (Access to the [Log Viewer Tool](#))

---

### **3.5.2.5. Granular Reports Permissions**

If the staff member has 'reports' permissions they have the ability to perform all of these actions. If you would like to control reports permissions on a more granular level set the GranularPermissions system preference to 'the individual modules' and choose from these options:

create\_reports

The ability to create and edit but not run SQL reports

execute\_reports

The ability to run but not create or edit SQL reports

---

## **3.6. Patron Information**

When viewing a patron record you have the option to view information from one of many tabs found on the left hand side of the record.

---

### **3.6.1. Check Out**

For instruction on checking items out, view the [Checking Out](#) section of this manual.

---

### **3.6.2. Details**

All patron information will appear on the Details tab. This includes all the contact information, notes, messaging preferences, etc entered when adding the patron.

In the case of patrons who are marked as 'Child' or 'Professional' and their Guarantors additional information will appear on their record.

A child patron will list their Guarantor

On the Guarantor's record, all children and/or professionals will be listed

---

### **3.6.3. Fines**

The patron's complete accounting history will appear on the Fines tab. Contrary to its name, the Fines tab does not just show fine data, it also shows membership fees, rental fees, reserve fees and any other charge you may have for patrons.

---

#### **3.6.3.1. Charging Fines/Fees**

Most fees and fines will be charged automatically if the [fines cron job](#) is running:

Fines will be charged based on your [Circulation & Fines Rules](#)

Hold fees will be charged based on the rules you set in the [Patron Types & Categories](#) administration area

Rental fees will be charged based on the settings in your [Item Types](#) administration area

Marking an item 'Lost' via the cataloging module will automatically charge the patron the replacement cost for that item

---

#### **3.6.3.2. Pay/Reverse Fines**

Each line item can be paid in full (or written off) using the 'Pay Fines' tab.

Choose the payment type (Unpaid, Paid, Writeoff) from the pull down menu

Click 'Make Payment'

A line item will be added to the account information showing the fee paid in full (or written off)

If you accidentally mark an item as paid, you can reverse that line item by clicking 'Reverse' to the right of the line

Once clicked a new line item will be added to the account, showing the payment as reversed

---

#### **3.6.3.3. Creating Manual Invoices**

For fees that are not automatically charged, librarians can create a manual invoice

First choose the type of invoice you would like to create

To add additional values to the manual invoice type pull down menu, add them to the [MANUAL\\_INV](#) Authorized Value

If the fee is associated with an item you can enter its barcode so that the line item shows a link to that item

The description field is where you will enter the description of the charge

In the amount field, do not enter currency symbols, only numbers and decimals

---

#### [3.6.3.4. Creating Manual Credits](#)

Manual credits can be used to pay off parts of fines, or to forgive a fine amount.

First choose the type of credit you'd like to apply

If this credit is associated with an item you can enter that item's barcode so that the line item links to the right item

The description field is where you will enter the description of the credit

In the amount field, do not enter currency symbols, only numbers and decimals

---

#### [3.6.4. Circulation History](#)

The circulation history tab will appear if you have set the [intranetreadinghistory](#) preference to allow it to appear.

---

#### [3.6.5. Modification Log](#)

If you have set your [BorrowersLog](#) to track changes to patron records, then this tab will appear. The Modification Log will show all changes made to the patron record.

The Librarian field shows the patron number for the librarian who made the changes

The Object field lists the patron that is being modified (in the example above, it was my changing my own record)

---

#### [3.6.6. Messaging](#)

The patron's messaging preferences are set when editing the patron. This tab will show the messages that have been sent and those that are queued to be sent:

---

#### [3.6.7. Notices](#)

---

### [3.7. Patron Search](#)

Clicking on the link to the Patron module will bring you to a search/browse screen for patrons. From here you can search for a patron by entering any part of their name or barcode in the search box at the top.

You can also browse through the patron records by clicking on the linked letters across the top.

Once a list of patrons is on the screen you can filter your results using the filter options on the left of the results.

Entering a filter without first browsing or searching will return no results.

---

## Chapter 4. Circulation

Circulation functions can be accessed in several different ways. On the main page of the staff client there are some quick links in the center of the page to check items out, in or transfer them. For a complete listing of Circulation functions you can visit the Circulation page which is linked from the top left of every page or from the center of the main page.

Before circulating your collection you will want to set your [Global System Preferences](#), [Basic Parameters](#) and [Patrons & Circulation Rules](#).

---

## [4.1. Check Out \(Issuing\)](#)

To begin the checkout process you must enter the patron barcode or part of their name. The checkout option appears in three main places:

Check out option on main staff client

Check out option on the patron record

Check out option on the quick search bar

---

### [4.1.1. Checking Items Out](#)

To check an item out to a patron, first search for that patron using one of the many options listed above.

At the top of the Check Out screen is a box for you to type or scan the item's barcode into.

Many modern barcode scanners will send a 'return' to the browser, making it so that the 'Check Out' button is automatically clicked

Below the box for the barcode there may be options for you to override the default due date for the item.

This option will only appear if you have set the [SpecifyDueDate](#) system preference to allow staff to override the due date

At the bottom of the page there is a summary of the patron's current checked out items along with the due date and the list of items the patron has on hold

Once you have checked out all of the items for the patron you can print them a receipt by clicking the Print button at the top of the screen and choosing 'Print Slip'

If there are notes on the patron record these will appear to the right of the checkout box

If the patron has a hold waiting at the library that too will appear to the right of the check out box making it easy for the circulation librarian to see that there is another item to give the patron

---

### [4.1.2. Check Out Messages](#)

There are times when Koha will prevent the librarian from being able to check out items to a patron. When this happens a warning will appear notifying the librarian of why the patron cannot check items out.

Patron owes too much in fines

You can set the amount at which patron checkouts are blocked with the [noissuescharge](#) system preference

Patron has been barred from the library

This can be set by the librarian editing a patron record and adding a [flag](#) or by the [Overdue/Notice Status Triggers](#)

Patron needs to confirm their address

This can be set by the librarian editing a patron record and adding a [flag](#)

Patrons has lost their library card

This can be set by the librarian editing a patron record and adding a [flag](#)

---

## [4.2. Check Out Warnings](#)

Sometimes checkouts will trigger warning messages that will appear in a yellow box above the check out field. These warnings need to be acknowledged before you will be able to continue checking items out.

Patron has outstanding fines

Item on hold for someone else

Item should be on the hold shelf waiting for someone else

Item already checked out to this patron

Item checked out to another patron

Item not for loan

Patron has too many things checked out

Item cannot be renewed

This can be overridden with the [AllowRenewalLimitOverride](#) system preference

Barcode not found

---

### **4.3. Check In (Returning)**

Checking in items can be performed from various different locations

The check in link on main staff client

The check in option on the quick search bar on the Circulation page

The check in link on the patron's checkout summary (and on the checkout summary page)

---

#### **4.3.1. Checking Items In**

To check an item in scan the barcode for the item into the box provided. A summary of all items checked in will appear below the checkin box

If you are checking items in that were put in the dropbox while the library was closed you can check the 'Dropbox mode' box before scanning items. This will effectively roll back the returned date to the last date the library was open.

This requires that you have your closings added to the [Holidays & Calendar Tool](#)

You can also choose to forgive all overdue charges for items you are checking in by checking the 'Forgive overdue charges' box before scanning items.

---

#### **4.3.2. Check In Messages**

There are several messages that can appear when checking items in:

If you are checking an item in at a library other than the home branch, a message will appear asking you to transfer the book to the home library

After this item is checked in the status of the item will be changed in the catalog to 'in transit'

To mark an item as back at the home branch, check the item in at the home branch

A message will appear tell you that the item is not checked out, but the status will now say available in the catalog. This step is necessary to mark items as received by the home branch.

If you're checking an item in that has a hold on it, you will be prompted to confirm the hold

Clicking the Confirm hold button will mark the item as waiting for pickup from the library

Clicking the Print Slip and Confirm button will mark the item as waiting for pickup at the library and present the library with a receipt to print and place on the book with the patron's information

Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)

If you're checking in an item that has a hold on it at another branch you will be prompted to confirm and transfer the item

Clicking the Confirm hold and Transfer button will mark the item as in transit to the library where the hold was placed

Clicking the Print Slip, Transfer and Confirm button will mark the item as in transit to the library where the hold was placed and present the library with a receipt to print and place on the book with the patron's information

Ignoring the hold will leave the item on hold, but leave its status as Available (it will not cancel the hold)

---

## **[4.4. Circulation Messages](#)**

Circulation messages are short messages that librarians can leave for their patrons or their colleagues that will appear at the time of circulation.

---

### **[4.4.1. Setting up Messages](#)**

Circulation messages are set up as [Authorized Values](#). To add or edit Circulation Messages you want to work with the BOR\_NOTES value.

---

### **[4.4.2. Adding a Message](#)**

When on the patron's check out tab you will see a link to 'Add a new message' to the right of the check out box.

When you click 'Add a new message' you will be asked to choose if the message is for the librarians or the patron and the message you would like to leave.

---

### **[4.4.3. Viewing Messages](#)**

Circulation messages meant for the staff will appear on the patron's checkout screen.

Circulation messages meant for the patron will appear when they log into the OPAC.

---

## **[4.5. Holds](#)**

### **[4.5.1. Placing Holds in Staff Client](#)**

There are several ways to place holds from the staff client. The most obvious is using the 'Place Hold' button at the top of any bibliographic record.

You can also click the smaller 'Place Hold' link found at the top of your catalog search results, or the 'Holds' link found below each result.

You will be asked to search for a patron by barcode or any part of their name to start the hold process.

Depending on how many items you choose to place a hold on at once you will see a different place hold form. If you are placing a hold on one bibliographic record you will see a list of all of the items you can place a hold on.

Enter any notes that might apply to this hold

Choose the library where the patron will pick up the item

If the patron wants the hold to start on a date other than today, enter that in the 'Hold starts on date' field

Next choose if you want to place a hold on the next available item or a specific item by clicking the radio button next to an individual item.

If you're placing a hold on multiple items you will be presented with the next available option for both titles.

---

### **[4.5.2. Managing Holds](#)**

### **[4.5.3. Receiving Holds](#)**

## **[4.6. Transfers](#)**

If you work in a multi-branch system you can transfer items from one library to another by using the Transfer tool. To transfer an item

Click 'Transfer' on the Circulation page

Enter the library you would like to transfer the item to

Scan or type the barcode on the item you would like to transfer

Click 'Submit'

The item will now say that it is in transit

The item will not be permanently moved to the new library

The item shows the same 'Home Library' but has updated the 'Current Location'

---

#### [4.7. Set Library](#)

By default you will enter the staff client as if you are at your home library. This library will appear in the top right of the Staff Client.

This is the library that all circulation transactions will take place at. If you are at another library (or on a bookmobile) you will want to set your library before you start circulating items. To do this you can click 'Set' at the top right or on the Circulation page.

Once you have saved your changes your new library will appear in the top right.

---

#### [4.8. Fast Add Cataloging](#)

Sometimes circulation librarians need to quickly add a record to the system for an item they are about to check out. This is called 'Fast Add.' To allow circulation librarians access to the Fast Add Cataloging tool, simply make sure they have the [fast cataloging](#) permissions. To add a title with the fast add framework, click the Fast Cataloging option on the Circulation page

The cataloging interface will open up with the short cataloging record:

After adding your cataloging data you will be asked to enter item data. Enter the items barcode, collection code, etc and save the item before checking it out.

---

#### [4.9. Circulation Reports](#)

##### [4.9.1. Holds Queue](#)

This report will show you all of the holds at your library. To generate this report, you must have the [Build Holds Queue cron job](#) running.

---

##### [4.9.2. Holds to pull](#)

This report will show you all of the items that have holds on them that are available at the library for pulling.

This report will be generated based on a few system preferences:

###### [StaticHoldsQueueWeight](#)

Allows the library to specify a list of library location codes -- if used alone, it will rank the list statically, selecting the top-ranking available location to be added to the picklist.

###### [RandomizeHoldsQueueWeight](#)

If 'RandomizeHoldsQueueWeight' and 'StaticHoldsQueueWeight' are set, the list of library codes in the 'StaticHoldsQueueWeight' system preference are randomized rather than statically ranked. If RandomizeHoldsQueueWeight alone is set, the list of all available library codes is used to randomize the weight.

If neither 'RandomizeHoldsQueueWeight' or 'StaticHoldsQueueWeight' is set, the holds queue is statically ranked according to how they are pulled out of the system database.

You can limit the results you see by using the Refine box on the left side of the page:

---

##### [4.9.3. Holds awaiting pickup](#)

This report will show all of the holds that are waiting for patrons to pick them up.

---

##### [4.9.4. Hold ratios](#)

Hold ratios help with collection development. Using this report you will be able to see how many of your patrons have holds on items and whether you should buy more. By default it will be set to the library needing 3 items per hold that has been placed. The report will tell you how many additional items need to be purchased to meet this quota.

---

#### [4.9.5. Transfers to receive](#)

This report will list all of the items that Koha thinks are in transit to your library.

---

#### [4.9.6. Overdues](#)

For libraries with a large patron base, this report may take a significant amount of time to run.

This report will list all items that are overdue at your library.

The report can be filtered using the menu options found on the left of the report.

---

#### [4.9.7. Overdues with fines](#)

### [4.10. Tracking Inhouse Use](#)

Many libraries track the use of items within the library. This is possible within Koha with the use of one or more [Statistical Patrons](#). When collecting items that have been used within the library, you will want to check them out to your statistical patron:

Instead of marking the item as 'checked out' the system will record that the item was used in house:

Repeat these steps for all items that have been used within the library to keep accurate statistics for item use.

---

### [4.11. In Processing / Book Cart Locations](#)

Koha allows for handling temporary locations like the processing center and/or book carts throughout the library. For this feature to work you must first make sure you have [authorized values](#) set in the LOC category for PROC (Processing Center) and CART (Book Cart).

Next you need to set the NewItemsDefaultLocation system preference to PROC. This will set the new items to the Processing Center as their default location.

Create items with their desired final shelving location.

These newly cataloged items will be temporarily set to the PROC location and will display with whatever description PROC has. The original location code entered at item creation is stored in the new items column 'permanent\_location', for future use. Items will stay in the PROC location until they are checked in. To have those items then move to the shelving cart:

Turn on the [InProcessingToShelvingCart](#) system preference

Check in those newly-created items and they will be moved to the location code of CART and display with whatever description CART has.

A [cron job](#) runs at specified intervals to age items from CART to the permanent shelving location. (For example, an hourly cron entry of cart\_to\_shelf.pl --hours 3 where --hours is the amount of time an item should spend on the cart before aging to its permanent location.)

If the syspref [ReturnToShelvingCart](#) system preference is turned on, any newly-checked-in item is also automatically put into the shelving cart, to be covered by the same script run.

Checkins with confirmed holds will not go into the shelving cart. If items on the shelving cart are checked out, the cart location will be cleared.

---

### [4.12. Self Checkout](#)

Koha comes with a very basic self checkout module. To use this module you have to log in as a [staff member](#) with [circulation permissions](#).

Create a [staff patron](#) specifically for this action so that you don't leave a real staff client logged into a computer all day

There is no link to the Self Checkout module, but a simple addition to the [intranetuserjs](#) system preference can add one.

```
$(document).ready(function(){ $("#login
#submit").parent().after("<p><a
href='http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl'
target='_blank'>Self-Checkout</a></p>"); });
```

The link will then appear at the bottom of the log in page:

You can also access this module by going to : [http://YOUR\\_KOHA\\_OPAC\\_URL/cgi-bin/koha/sco/sco-main.pl](http://YOUR_KOHA_OPAC_URL/cgi-bin/koha/sco/sco-main.pl)

When on the self checkout page you will be asked to enter your patron card number:

Once your card number is entered you will be asked to scan the items you are checking out

As you scan items they will appear below the barcode box

When you are finished scanning items it is important to click the 'Click here if done' button to log the patron out and prepare for the next patron.

When attempting to check items out there are some instances where error messages will appear and the patron will be directed to the librarian.

---

### **[4.13. Offline Circulation Utility](#)**

You can find koc file format specification on this page: [http://wiki.koha.org/doku.php?id=koha\\_offline\\_circulation\\_file\\_format](http://wiki.koha.org/doku.php?id=koha_offline_circulation_file_format)

---

#### **[4.13.1. Firefox Plugin](#)**

There is a plugin for Firefox that can be used for Offline Circulation: <https://addons.mozilla.org/en-US/firefox/addon/14399>

Once installed there will be an icon for the Offline Circulation Tool in the status bar at the bottom of you Firefox Window.

Additional instructions for using this Plugin can be found on the Koha Wiki: [http://wiki.koha.org/doku.php?id=offline\\_circulation\\_firefox\\_plugin](http://wiki.koha.org/doku.php?id=offline_circulation_firefox_plugin)

---

#### **[4.13.2. Offline Circ Tool for Windows](#)**

The Offline Circulation Utility can be downloaded at: <http://kylehall.info/index.php/projects/koha-tools/koha-offline-circulation/>

---

#### **[4.13.3. Upload Offline Circ File](#)**

---

## **Chapter 5. Cataloging**

---

### **[5.1. Bibliographic Records](#)**

---

#### **[5.1.1. Adding Records](#)**

Records can be added to Koha via original or copy cataloging. If you would like to catalog a record using a blank template

Click 'New Record'

Choose the framework you would like to base your record off of

If you want to catalog a record based on an existing record at another library

Click 'z39.50 Search'

Search for the item you would like to catalog

If no results are found, try searching for fewer fields, not all Z39.50 targets can search all of the fields above.

Search targets can be altered by using the [Z39.50 Admin](#) area.

From the results you can view the MARC or Card view for the records or choose to Import them into Koha

Once you've opened a blank framework or imported a record via Z39.50 you will be presented with the form to continue cataloging

To expand a collapsed tag click on the tag number

To duplicate a field click on the + (plus sign) to the right of the tag

To move subfields in to the right order, click the up arrow to the left of the field

To remove a subfield (if there is more than one of the same type), click the - (minus sign) to the right of the field

To use a plugin click on the ... (ellipse) to the right of the field

Once you've finished, click the 'Save' button at the top

If you are about to add a duplicate record to the system you will be warned before saving

---

### **5.1.2. Editing Records**

To edit a record you can click 'Edit Biblio' from the search results on the cataloging page

or by clicking the Edit button on the Bibliographic Record

The record will open in the MARC editor

Once you have made your edits you can click 'Save' at the top of the editor.

---

### **5.1.3. Duplicating Records**

Sometimes a copy of the record you need to catalog can't be found via Z39.50. In these cases you can create a duplicate of similar record and edit the necessary pieces to create a new record. To duplicate an existing record click 'Edit as New (Duplicate)' from the Edit menu on the Bibliographic Record

This will open a new MARC record with the fields filled in with the values from the original Bibliographic Record.

---

## **5.2. Item Records**

---

### **5.2.1. Adding Items**

After saving a new bibliographic record, you will be redirected to a blank item record so that you can attach an item to the bibliographic record. You can also click 'Add Holdings' from the cataloging search results

or you can add new item at any time by clicking 'New' on the bibliographic record and choosing 'New Item'

The item edit form will appear:

At the very least, the following fields should be entered for new items:

8 - Collection code

a - Permanent location

b - Shelving location

o - Full call number

p - Barcode

v - Cost, replacement price

This value will be charged to patrons when you mark an item they have checked out as 'Lost'

y - Koha item type

Below the add form there are 3 buttons for adding the item

Add Item will add just the one item

Add & Duplicate will add the item and fill in a new form with the same values for you to alter

Add Multiple Copies will ask how many copies and will then add that number of copies adding +1 to the barcode so each barcode is unique

Your added items will appear above the add form once submitted

---

### [5.2.2. Editing Items](#)

Items can be edited in several ways.

Clicking 'Edit' and 'Edit Items' from the bibliographic record

Clicking 'Edit Items' beside the item on the 'Items' tab

The edit menu is also where items can be deleted from:

---

### [5.2.3. Moving Items](#)

Items can be moved from one bibliographic record to another using the Attach Item option

Visit the bibliographic record you want to attach the item to and choose 'Attach Item' from the 'Edit' menu.

Simply enter the barcode for the item you want to move and click 'Select'

---

## [5.3. Authorities](#)

---

## Chapter 6. Serials

---

### [6.1. Add a subscription](#)

Subscriptions can be added by clicking the 'New' button on any bibliographic record

Or by visiting the Serials module and clicking 'New Subscription'

If you are entering a new subscription from the Serials module you will be presented with a blank form (if creating new from a bibliographic record the form will include the bib info).

'Librarian' field will show the logged in librarian's username

'Vendor' can be found by either searching vendors entered via the [Acquisitions module](#) or entering the vendor ID number

Vendor information is not required

In order to claim missing and late issues you need to enter vendor information

'Biblio' is the MARC record you'd like to link this subscription to

This can be done by searching for an existing record or by entering the bib number for a record

Next you can choose whether a new item is created when receiving an issue

'Location' is for the shelving location

'Call Number' is for your item's call number prefix

'Library' is the branch that owns this subscription.

If more than one library subscribes to this serial you will need to create a subscription for each library

This can be done easily by using the 'Edit as New (Duplicate)' option found on the subscription information page and changing only the 'Library' field

The 'Grace Period' is the number of days before an issue is automatically moved from 'expected' status to 'waiting' and how many days before an issue is automatically moved from 'waiting' status to 'late'

Use the 'Public Note' for any notes you would like to appear in the OPAC for the patrons

'Nonpublic Note' should be used for notes that are only visible to the librarians via the staff client

To set up a routing list for serials, choose 'Routing List' from the 'Patron notification' field.

For this option to appear you need to make sure that you have a Routing List notice set up in the [Notices Tool](#)

Learn more about [Routing Lists](#) later in this manual

The Staff and OPAC Display options allow you to control how many issues appear by default on bibliographic records in the Staff Client and the OPAC

If no values are entered in these fields, they will use the OPACSerialIssueDisplayCount and StaffSerialIssueDisplayCount system preference values

In 'First issue publication' you want to enter the the date of the issue you have in your hand, the date from which the prediction pattern will start

There are several pre-defined options for the 'Frequency' of publication

Without periodicity: some very specific (usually high level science journals) don't have a true periodicity. When you subscribe to the title, you subscribe for 6 issues, which can arrive in 1 year... or 2... There is no regularity or known schedule.

Unknown select this if none of the other choices are relevant

Irregular: The journal is not "regular" but has a periodicity. You know that it comes out on January, then in October and December, it is irregular, but you know when it's going to arrive.

2/day: Twice daily

1/day: Daily

3/week: Three times a week

1/week: Weekly

1/ 2 weeks: Twice monthly (fortnightly)

1/ 3 weeks: Tri-weekly

1/month: Monthly

1/ 2 months (6/year): Bi-monthly

1/ 3 months (1/quarter): Quarterly

1/quarter (seasonal) : Quarterly related to seasons (ie. Summer, Autumn, Winter, Spring)

2/year: Half yearly

1/year: Annual

1/ 2 years: Bi-annual

Checking the 'Manual history' box will allow you to enter serials outside the prediction pattern.

'Numbering pattern' will help you determine how the numbers are printed for each issue

Start with the numbering on the issue you have in hand, the numbering that matches the date you entered in the 'First issue publication' field

In the 'Rollover at' field, enter the last issue number before the volume number changes

You can choose to create your own numbering pattern by choosing 'None of the above' and clicking the 'Show/Hide Advanced Pattern' button at the bottom of the form

'Subscription start date' is the date at which the subscription begins. This is used for setting up renewal alerts

'Subscription length' is the number of issues or months in the subscription. This is also used for setting up renewal alerts

'Subscription end date' should only be entered for subscriptions that have ended (if you're entering in a backlog of serials)

The 'Numbering formula' is editable to match the way you'd like your numbering to print on the item record and subscription information pages

Click 'Save Subscription' to save the information you have entered.

---

## **6.2. Receive Issues**

Issues can be marked as received from several locations. To find a subscription, use the search box at the top of the Serials page to search for the serial you'd like to receive issues for:

From the search results you can click the 'Serial Receive' link or you can click on the subscription title and then click the 'Receive' button.

The final way to receive serials is from the 'Serial Collection' page. To the left of the Subscription summary page there is a menu with a link to 'Serial Collection'

From the page that opens up you can click 'Edit Serial' with the issue you want to receive checked.

All three of these options will open up the issue receive form:

Choose 'Arrived' from the status pull down to mark a serial as received.

If you have decided to have an item record created for each issue an [item add form](#) will appear

If your issue has a supplemental issue with it, fill in the Supplemental Issue information.

If you have decided to have an item record created for each issue an [item add form](#) will appear for your supplement and for the issue itself

Once you have entered your info you can click 'Save'

---

## **6.3. Create a Routing List**

If RoutingListAddReserves is set to on then patrons listed in the routing list will automatically be added to the holds list for the issue.

---

## **6.4. Subscriptions in Staff Client**

Subscription information will appear on bibliographic records under the 'Subscriptions' tab

Clicking the 'Subscription Details' link will take you to the Subscription summary page in the staff client.

---

## **6.5. Subscriptions in OPAC**

When viewing the subscription in the OPAC there will be several options.

Like in the staff client, there will be a Subscriptions tab on the bibliographic record.

Under this tab will appear the number of issues you chose when setting up the subscription or in your OPACSerialIssueDisplayCount system preference. Clicking the 'More details' link will provide you with additional information about the serial history. You can set the default view of a serial in the OPAC with the SubscriptionHistory system preference.

There are two views, compact and full. The compact serial subscription will show basic information regarding the subscription

Whereas the full view shows extensive details, broken out by year, regarding the subscription

---

# **Chapter 7. Acquisitions**

---

## **7.1. Setup**

Before using the Acquisitions Module you will want to make sure that you have completed all of the set up.

First, set your [Acquisitions System Preferences](#) and [Acquisitions Administration](#) to match your library's workflow.

---

## **7.2. Vendors**

Before any orders can be places you must first enter at least one vendor.

---

### [7.2.1. Add a Vendor](#)

To add a vendor click the 'New Vendor' button on the Acquisitions page

The vendor add form is broken into three pieces

The first section is for basic information about the Vendor

Of these fields, only the Vendor name is required, the rest of the information should be added to help with generating claim letters and invoices

The second section is for information regarding your contact at the Vendor's office

None of these fields are required, they should only be entered if you want to keep track of your contact's information within Koha

The final section is for billing information

To be able to order from a vendor you must make them 'Active'

For List Prices and Invoice Prices choose the currency

Currencies are assigned in the [Currencies & Exchange Rates](#) admin area

If the vendor offers a consistent blank discount, enter that in the 'Discount' field

You can enter item specific discounts when placing an order

GST rate is for any tax the vendor may charge

Notes are for internal use

---

### [7.2.2. View/Edit a Vendor](#)

To view a vendor's information page you must search for the vendor from the Acquisitions home page. Your search can be for any part of the Vendor's name:

From the results, click on the name of the vendor you want to view or edit

To make changes to the vendor, simply click the 'Edit' button.

---

### [7.2.3. Vendor Contracts](#)

You can define contracts (with a start and enddate) and attach it to a vendor. This is used so that at the end of the year you can see how much you spent on a specific contract with a vendor. In some places, contracts are set up with a minimum and maximum yearly amount.

---

## [7.3. Managing Suggestions](#)

Depending on your settings in the [suggestion](#) system preference, patrons may be able to make purchase suggestions via the OPAC.

---

## [7.4. Placing Orders](#)

To place an order you must first search for the vendor or bookseller you want to send the order to.

---

### [7.4.1. Create a basket](#)

To create a basket you have several options from the vendor search results page:

From here you can choose to create a new basket by clicking 'New basket' under 'Manage orders' or by clicking 'Add basket'

When adding a basket you want to give it a name that will help you identify it later. The notes fields are optional and can contain any type of information. When finished, click 'Save'

Once your basket is created you are presented with several options for adding items to the order.

If you are ordering another copy of an existing item, you can simply search for the record in your system

From the results, simply click 'Order' to be brought to the order form

All of the details associated with the item will already be listed under 'Catalog details'

If you allow patrons to make purchase suggestions (learn more in the [Managing Suggestions](#) section of this manual) then you can place orders from those suggestions

From the results, click 'Order' next to the item you want to order and you will be presented with the order form

From this form you can make changes to the Catalog Details if necessary

To order from a record that can't be found anywhere else, choose the 'From a new (empty) record'

You will be presented with an empty form to fill in all of the necessary details about the item you are ordering

If you want to search other libraries for an item to purchase you can use the 'From an external source' option which will allow you to order from a MARC record found via a Z39.50 search

From the results click the Order link next to the item you want to purchase

In the order form that pops up you will not be able to edit the catalog details

The final option for ordering is to order from a staged record ([learn more about staging records](#))

From the list of files you are presented with, choose the 'Add orders' link

From the list of records, click 'Add order' next to the item you want to add to your order

From the order form you will not be able to edit the catalog details.

Once an item is added to the basket you will be presented with a basket summary

From here you can edit the items you have added or remove them. Once you're sure your basket is complete you can click 'Close this basket' button

---

#### [7.4.2. Create a basket group](#)

A basket group is simply a group of baskets. In some libraries, you have several staff members that create baskets, and, at the end of a period of time, someone then groups them together to send to the vendor in bulk. That said, it is possible to have one basket in a basket group if that's the workflow used in your library.

---

#### [7.4.3. Printing baskets](#)

---

### [7.5. Receiving Orders](#)

---

#### [7.6. Claims & Late Orders](#)

---

#### [7.7. Acquisition Searches](#)

At the top of the various Acquisition pages there is a quick search box where you can perform either a Vendor Search or an Order Search.

In the Vendor Search you can enter any part of the vendor name to get results.

Using the Order Search you can search for items that have been ordered with or without the vendor.

You can enter info in one or both fields and you can enter any part of the title and/or vendor name.

---

## Chapter 8. Lists & Cart

Lists are a way to save a collection of content on a specific topic or for a specific purpose. The Cart is a session specific storage space.

---

### [8.1. Lists](#)

---

#### [8.1.1. Create a List](#)

A list can be created by visiting the Lists page and clicking 'New List'

The new list form offers several options for creating your list:

The name is what will appear on the list of Lists

You can also choose how to sort the list

Finally there are three types of lists you can choose from

A Private List is managed by you and can be seen only by you

A Public List can be seen by everybody, but managed only by you

A Open List can be seen and managed by everybody

A list can also be created from the catalog search results

Check the box to the left of the items you want to add to the new list

Choose [New List] from the 'Add to:' pull down menu

Name the list and choose what type of list this is

A Private List is managed by you and can be seen only by you

A Public List can be seen by everybody, but managed only by you

A Open List can be seen and managed by everybody

Once the list is saved it will be accessible from the Lists page and from the 'Add to' menu at the top of the search results.

---

#### [8.1.2. Add to a List](#)

To add items to an existing list click on the list name from the page of lists

From the List page you can add items by scanning barcodes into the box at the bottom of the page

An item can also be added to a list by selecting items on the search results page and choosing the list from the 'Add to' menu

---

#### [8.1.3. Viewing Lists](#)

To see the contents of a list, visit the Lists page on the staff client

Clicking on the 'List Name' will show the contents of the list

---

## [8.2. Cart](#)

To add things to the cart, search the catalog and select the items you would like added to your cart and choose 'Cart' from the 'Add to' menu

A confirmation will appear below the cart button at the top of the staff client

Clicking on the Cart icon will provide you with the contents of the cart

From this list of items you can perform several actions

'Send' will send the list to the email address you enter

'Download' will allow you to download the cart using one of 3 default formats or your [CSV Profiles](#)

'Print' will present you with a printable version of the cart

'Empty and Close' will empty the list and close the window

'Hide Window' will close the window

---

## Chapter 9. Reports

---

### [9.1. Custom Reports](#)

Koha's data is stored in a MySQL database which means that librarians can generate nearly any report they would like by either using the Guided Reports Wizard or writing their own SQL query.

---

#### [9.1.1. Add Custom Report](#)

---

##### [9.1.1.1. Guided Report Wizard](#)

The guided report wizard will walk you through a six step process to generate a report.

Step 1: Choose the module you want to report on. This will determine what tables and fields are available for you to query.

Step 2: Choose a report type. For now, Tabular is the only option available.

Step 3: Choose the fields you want in your report. You can select multiple fields and add them all at once by using CTRL+Click on each item you want to add before clicking the Add button.

Step 4: Choose any limits you might want to apply to your report (such as item types or branches). If you don't want to apply any limits, simply click Next instead of making an option.

Step 5: Perform math functions. If you don't want to do any calculations, simply click Next instead of making an option.

Step 6: Choose data order. If you want the data to print out in the order it's found in the database, simply click Finish.

When you are finished you will be presented with the SQL generated by the report wizard. From here you can choose to save the report by clicking 'Save' or copy the SQL and make edits to it by hand.

If you choose to save the report you will be asked to name your report and enter any notes regarding it.

Once your report is saved it will appear on the 'Use Saved' page with all other saved reports.

From here you can make edits, run the report, or schedule a time to have the report run.

---

##### [9.1.1.2. Report from SQL](#)

In addition to the report wizard, you have the option to write your own queries using SQL. To find reports written by other Koha users, visit the Koha Wiki: [http://wiki.koha.org/doku.php?id=sql\\_library](http://wiki.koha.org/doku.php?id=sql_library). You can also find your database structure in `/installer/data/mysql/kohastructure.sql` or online at: [http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob\\_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD](http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD).

To add your query, simply fill in the form presented

---

### [9.1.2. Edit Custom Reports](#)

Every report can be edited from the reports lists. To see the list of reports already stored in Koha, click 'Use Saved.'

From this list you can edit any custom report by clicking 'Edit SQL'

---

## [9.2. Statistics Reports](#)

Statistic reports will show you counts and sums. These reports are all about numbers and statistics, for reports that return more detailed data, use the [Guided Report Wizard](#).

---

### [9.2.1. Acquisitions Statistics](#)

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

When generating your report, note that you get to choose between counting or summing the values.

Choosing amount will change your results to appear as the sum of the amounts spent.

---

### [9.2.2. Patron Statistics](#)

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

Based on your selections, you may see some query information above your results table. You can also choose to export to a file that you can manipulate to your needs.

---

### [9.2.3. Catalog Statistics](#)

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

---

### [9.2.4. Circulation Statistics](#)

Using the form provided, choose which value you would like to appear in the Column and which will appear in the Row.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

To get a complete picture of your monthly or daily circulation, you can run the report twice, once for 'Type' of 'Checkout' and again for 'Renewal.'

This report uses 'Period,' or date, filtering that allows you to limit to a month by simply selecting the first day of the first month through the first day of the next month. For example, 10/1 to 11/1 to find statistics for the month of October.

To find daily statistics, set your date range. Example: "I want circulation data starting with date XXX up to, but not including, date XXX."

For a whole month, an example range would be: 11/01/2009 to 12/01/2009

For a whole year, an example range would be: 01/01/2009 to 01/01/2010

For a single day, an example would be: 11/15/2009 to 11/16/2009 to find what circulated on the 15th

---

### [9.2.5. Serials Statistics](#)

Using the form provided, choose how you would like to list the serials in your system.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

---

### [9.2.6. Patrons with the most checkouts](#)

This report will simply list the patrons who have the most checkouts.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

---

### [9.2.7. Most Circulated Items](#)

This report will simply list the items that have the been checked out the most.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

---

### [9.2.8. Patrons with no checkouts](#)

#### [9.2.9. Items with no checkouts](#)

This report will list items in your collection that have never been checked out.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

---

#### [9.2.10. Catalog by Item Type](#)

This report will list the total number of items of each item type per branch.

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

---

#### [9.2.11. Lost Items](#)

This report will allow you to generate a list of items that have been marked as Lost within the system

---

#### [9.2.12. Average Loan Time](#)

This report will list the average time items are out on loan based on the criteria you enter:

If you choose to output to the browser your results will print to the screen.

You can also choose to export to a file that you can manipulate to your needs.

---

## [9.3. Report Dictionary](#)

The report dictionary is a way to pre-define common filters you'd like to apply to your reports. This is a good way to add in filters that the report wizard doesn't include by default. To add a new definition, or filter, click 'New Definition' on the Reports Dictionary page and follow the 4 step process.

Step 1: Name the definition and provide a description if necessary

Step 2: Choose the module that the will be queried.

Step 3: Choose columns to query from the tables presented.

Step 4: Choose the value(s) from the field(s). These will be automatically populated with options available in your database.

Confirm your selections to save the definition.

Your defintions will all appear on the Reports Dictionary page

Then when generating reports on the module you created the value for you will see an option to limit by the definition at the bottom of the usual filters.

---

## **Chapter 10. OPAC**

This chapter assumes that you have the following preferences set as follows:

OPACXSLTResultsDisplay = using XSLT stylesheets

OPACXSLTDetailsDisplay = using XSLT stylesheets

[DisplayOPACiconsXSLT](#) = show

If your system preferences are set differently your displays may differ.

---

## **[10.1. Search Results](#)**

To search the OPAC you can either choose to enter your search words in the box at the top of the OPAC or click on the 'Advanced Search' link to perform a more detailed search.

For more on searching check the 'Searching' chapter in this manual.

---

### **[10.1.1. Results Overview](#)**

After performing a search the number of results found for your search will appear above the results

By default your search results will be sorted based on your OPACdefaultSortField and OPACdefaultSortOrder system preference values. To change this you can choose another sorting method from the pull down on the right.

Under each title on your results list a series of values from your leader will appear. It is important to note that this has nothing to do with the item types or collection codes you have applied to your records, this data is all pulled from your leader.

Below each title you will see the availability for the items attached to the record. Note that even if you filtered on one library location all locations that hold the item will appear on the search results.

If you have turned on Enhanced Content preferences you may have book jackets on your search results.

---

### **[10.1.2. Filters](#)**

To filter your results click on the links below the 'Refine Your Search' menu on the left of your screen

---

### **[10.1.3. Search RSS Feeds](#)**

You will be able to subscribe to your search results as an RSS feed by clicking the RSS icon in your address bar or next to the number of results. To learn more about what RSS feeds are check out [this tutorial video](#).

Subscribing to search results as RSS feeds will allow you to see when a new item is added to the catalog in your area of interest.

---

## **[10.2. Bibliographic Record](#)**

---

### **[10.3. Lists & Cart](#)**

A cart is a temporary holding place for records you're interested in finding during this session. That means that once you log out of the OPAC or close the browser you lose the items in your cart. A list is a more permanent location for saving items. To learn more about lists, check the Lists in the Staff Client chapter of this manual.

---

#### **[10.3.1. Lists](#)**

---

##### **[10.3.1.1. Adding titles to Lists](#)**

Titles can be added to lists from the search results and/or from the bibliographic record. On the search results options to add items to the list appear below each result and across the top of the results page

To add a single title to a list, click the 'Save to Lists' option and then choose the list you'd like to add the title to. To add multiple titles to a list check the boxes on the left of the titles you want to add and then choose the list you want to add the titles to from the 'Add too' pull down at the top of the screen.

---

### [10.3.1.2. Managing Lists](#)

---

## [10.3.2. Cart](#)

---

### [10.3.2.1. Adding titles to the Cart](#)

Titles can be added to the cart from the search results and/or from the bibliographic record. On the search results options to add items to the cart appear below each result and across the top of the results page

Clicking the 'Add to Cart' button will add the one title to your cart. To add multiple titles at once, check the box to the left of each result and then choose 'Cart' from the 'Add to' pull down at the top of the screen. Once titles are added to the cart you will be presented with a confirmation

---

### [10.3.2.2. Managing the Cart](#)

Once you have titles in your cart you can manage the contents by clicking on the 'Cart' button usually found at the top of the screen to the right of the search box. Your cart will open in a new window.

From this window you are presented with several options. Across the top of the cart are several buttons.

First is the 'More details' button. Clicking this will show you additional information about the titles in your cart (ISBNs, Subjects, Publisher Info, Notes and more).

Next is the option to send the contents of your cart to an email address. This is handy if you want to send the resources you found at the library to your home email account to refer to later or to send to a patron researching a specific topic. Clicking this link will open up a new window that asks for the email address and message to send.

In addition to sending your cart you can download the contents of your cart in several pre-defined formats or using a [CSV Profile](#) that you defined in the Tools module.

Finally you can print out the contents of your cart by choosing the 'Print' link.

In addition to the various different ways to save the contents of your cart, there are ways to add value to the data in your cart. By selecting one or more titles from the cart you can add them to a list (click 'Add to a List'), place hold(s) (click 'Place hold'), or tag them (click 'Tag'). All of these operations follow the same procedure as they do when performing them in the OPAC.

---

## [10.4. Enhanced Content](#)

---

### [10.4.1. Tagging](#)

Depending on your settings for the [TagsEnabled](#), [TagsInputOnList](#) and [TagsInputOnDetail](#) preferences you may be able to add tags to bibliographic records from the search results and/or bibliographic records. If you are allowing patrons to add tags from the search results screen you will see an input box below each result and a 'Tag' option at the top of the screen.

To add a tag to one item, type the tags (separated by commas) in the 'New tag' box and click 'Add'. You will be presented with a confirmation of your tags being added.

From the results you can also tag items in bulk by clicking the checkboxes on the left and then clicking the 'Tag' button at the top. After clicking the button it will change into an input box for you to add tags to all of the items you have selected.

---

### [10.4.2. Comments](#)

Patrons can leave comments in the OPAC if you have the [reviewson](#) preference set to allow this. Each bibliographic record has a comments tab below the bibliographic information.

If the patron is logged in they will see a link to add a comment to the item. Clicking this link will open a pop up window with a box for their comments.

Once the comment has been typed and the 'Submit' button clicked, the patron will see their comment as pending and other patrons will simply see that there are no comments on the item.

Once the comment is approved the patron will see the comment highlighted in yellow as their comment.

Other patrons will see the comment with the name of the patron who left the comment.

---

### [10.4.3. Zotero](#)

Zotero is a Firefox add on that allows for the saving and generating of a bibliography. Learn more about and download Zotero at <http://zotero.org>.

When on the search results in the Koha OPAC, if you have Zotero installed, you will see a folder icon in the address bar to the right of the URL. Clicking that folder will open up a list of titles on the page for you to pick from to add to Zotero.

Select the titles you want to add to Zotero and then click the 'OK' button. This will add the title to Zotero. You can see the title by opening your Zotero library.

---

### [10.4.4. Custom RSS Feeds](#)

Using `misc/cronjobs/rss/rss.pl` you can generate an RSS feed for any SQL query (for example a new acquisitions RSS feed). `rss.pl` is run on the command line to produce an RSS XML document.

The output should be placed in a directory accessible to the OPAC (or staff) web interface so that users can download the RSS feed.

An example of usage can be found at: `misc/cronjobs/rss.pl lastAcquired.conf`

Normally `rss.pl` should be run periodically (e.g., daily) to keep the feed up-to-date.

The configuration file (e.g., `lastAcquired.conf`) lists

- name of the template file to use

- path of output file

- SQL query

`rss.pl` runs the SQL query, then feeds the output of the query through the template to produce the output file.

- To use custom RSS feeds you need to turn on the cron job.

---

## [10.5. My Account](#)

From the OPAC patrons can log in and access their account if you have set the [opacuserlogin](#) preference to 'Allow'. Once logged in patrons are brought to their account summary. If you would like to get from any other page your account in the OPAC, click on your name in the top right of the OPAC.

From the 'my summary' tab, patrons will see all of the items they have checked out with the overdue items highlighted in red. If you have `OpacRenewalAllowed` set to 'Allow' then your patrons will be able to renew their books right from the OPAC. Clicking on the 'Overdue' tab will show only the items that are overdue.

The 'Fines' tab will show just a total of what the patron owes. Clicking on the total will take them to the 'my fines' tab where they will see a complete breakdown of their fines and bills. If you don't charge fines at your library you can turn the display of these tabs off by setting the [OPACFinesTab](#) preference to 'Don't Allow.'

Finally, clicking on the 'Holds' tab will show the patron the status of all of the items they have on hold. Items that are ready for pickup will be highlighted in yellow.

If your library charges fines the next tab on the left is 'my fines.' Opening this tab will show the patron an entire history of their accounting at the library.

If you have your [OPACPatronDetails](#) preference set to 'Allow', your patrons will see a form filled in with their contacting information by clicking on the 'my personal details' tab.

Patrons can edit their details in this form and click 'Submit Changes' to have their edits sent to the library for review before their record is updated. If the [OPACPatronDetails](#) preference is set to 'Don't allow' then patrons will simply see their details in plain text.

If your library has [TagsEnabled](#) set to 'Allowed' then the next tab on the left will be 'my tags.' This tab will show patrons all of the tags in the system as a cloud and then all of the tags they have applied in a list format. From here patrons have the ability to remove tags that they have added if they want.

Next, if you have [OpacPasswordChange](#) set to 'Allow' the next tab will be 'change my password,' where patrons can change their password for logging into the OPAC. Patrons will be presented with a standard form asking them to enter their old password and then their new password twice.

Depending on your library's setting for `OpacPrivacy` and [opacreadinghistory](#) you patrons may see the 'my reading history' tab next. This will show the patron their entire reading history.

If your library allows patrons to make purchase suggestions the next tab will show all suggestions that the patron made to the library and their statuses. To disable this tab and the suggestion functionality set the [suggestion](#) preference to 'Don't allow.'

If your library as the [EnhancedMessagingPreferences](#) preference set to 'Allow' then your patrons will be able to choose which messages they receive from the library (with the exception of overdue notices which the library controls).

Finally, if your library has the [virtualshelves](#) set to 'Allow' then the last tab will be 'my lists.' From here your patrons can review public lists and create or edit their own private lists.

---

## Chapter 11. Searching

---

### 11.1. Advanced Search Prefixes

The following prefixes can be added to search terms in the keyword search box to limit items returned

ti: title search

ex. ti:hamlet

su: subject search

ex. su:cookery

pb: publisher search

ex. pb:penguin

au: author search

ex. au:rowling

su-geo: geographic subjects

ex. su-geo:wales and kw:description and kw:travel

bc: barcode

ex. bc:502326000912

lex: lexile

levels lex:510

---

### 11.2. Guide to Searching

Becky Bell October 2008 Nicole C. Engard

This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

---

#### 11.2.1. Indexing and Searching Description

Koha's databases are indexed by the Zebra open-source software. The overview to the documentation describes Zebra as:

"...Zebra is a high-performance, general-purpose structured text indexing and retrieval engine. It reads records in a variety of input formats (eg. email, XML, MARC) and provides access to them through a powerful combination of Boolean search expressions and relevance-ranked free-text queries.

Zebra supports large databases (tens of millions of records, tens of gigabytes of data). It allows safe, incremental database updates on live systems. Because Zebra supports the industry-standard information retrieval protocol, Z39.50, you can search Zebra databases using an enormous variety of programs and toolkits, both commercial and free, which understands this protocol..." Zebra - User's Guide and Reference, p. 1, <http://www.indexdata.dk/zebra/doc/zebra.pdf>

This brief guide will explain a chart that shows a sample of how a MARC21 database can be configured, as well as a brief introductory searching guide. The indexing fields described in this document relate to the bibliographic data and does not address authority database indexing.

The indexing described in this document is the set used by SouthEastern University. Your local indexing may vary.

---

### 11.2.2. Indexing Configuration

There are three configuration files that Koha uses while indexing.

The first configuration file (`etc/zebradb/biblios/etc/bib1.att`) contains the Z39.50 bib-1 attribute list, plus the Koha local use attributes for Biblio Indexes, Items Index, and Fixed Fields and other special indexes. The Z39.50 Bib-1 profile is made up of several different types of attributes: Use, Relation, Position, Structure, Truncation, and Completeness. The bib-1 'Use' attribute is represented on the chart; the other attributes are used primarily when doing searches. While there are over 150+ use attributes that could be used to define your indexing set, it's unlikely that you will choose to use them all. The attributes you elect to use are those that become the indexing rules for your database. The other five attribute sets define the various ways that a search can be further defined, and will not specifically be addressed in this document. For a complete list of the standard Bib-1 attributes, go to <http://www.loc.gov/z3950/agency/bib1.html>.

The second file (`etc/zebradb/marc_defs/[marc21|unimarc]/biblios/record.abs`) contains the abstract syntax which maps the MARC21 tags to the set of Use Attributes you choose to use. The rules established in this file provides a passable Bath level 0 and 1 service, which includes author, title, subject, keyword and exact services such as standard identifiers (LCCN, ISBN, ISSN, etc.)

The third file (`etc/zebradb/ccl.properties`) is the Common Command Language (CCL) field mappings. This file combines the bib-1 attribute set file and the abstract file and adds the qualifiers, usually known as index names. The qualifiers, or indexes, for this database are: pn, cpn, cfn, ti, se, ut, nb, ns, sn, lcn, callnum, su, su-to, su-geo, su-ut, yr, pubdate, acqdate, ln, pl, ab, nt, rtype, mc-rtype, mus, au, su-na, kw, pb, ctype, and an.

The Koha Indexing Chart summarizes the contents of all three of these files in a more readable format. The first two columns labeled Z39.50 attribute and Z39.50 name matches the Z39.50 bib-1 attributes file. The third column labeled MARC tags indexed is where you find which MARC tags are mapped to an attribute. The fourth column labeled Qualifiers identifies the search abbreviations used in the internal CCL query. The following description provides a definition for the word 'qualifiers'.

*Qualifiers are used to direct the search to a particular searchable index, such as title (ti) and author indexes (au). The CCL standard itself doesn't specify a particular set of qualifiers, but it does suggest a few shorthand notations. You can customize the CCL parser to support a particular set of qualifiers to reflect the current target profile. Traditionally, a qualifier would map to a particular use-attribute within the BIB-1 attribute set. It is also possible to set other attributes, such as the structure attribute.*

In the MARC tags indexed column, there are some conventions used that have specific meanings. They are:

A three digit tag (100) means that all subfields in the tag can be used in a search query. So, if you enter a search for 'Jackson' as an author, you will retrieve records where Jackson could be the last name or the first name.

A three digit tag that has a '\$' followed by a letter (600\$a) means that a search query will only search the 'a' subfield.

A three digit tag that is followed by a ':' and a letter (240:w) means that a search query can be further qualified. The letter following the ':' identifies how to conduct the search. The most common values you'll see are 'w' (word), 'p' (phrase), 's' (sort), and 'n' (numeric).

The contents of the MARC tags, subfields, and/or fixed field elements that are listed in this chart are all indexed. You'll see that every attribute line is not mapped to a specific qualifier (index)-LC card number, line 9 is one example. However, every indexed word (a string of characters preceded and succeeded by a space) can be searched using a keyword (kw) search. So, although an LC card number specific index doesn't exist, you can still search by the LCCN since tag 010 is assigned to the LC-card-number attribute. To verify this, enter 72180055 in the persistent search box. You should retrieve The gods themselves, by Isaac Asimov.

Examples of fixed field elements indexing can be seen on the chart between Attribute 8822 and Attribute 8703. These attributes are most commonly used for limiting. The fixed field attributes currently represent the BK codes. Other format codes, if needed, could be defined.

---

### 11.2.3. Basic Searching

The search box that library staff and library patrons will see most often is the persistent search box at the top of the page. Koha interprets the searches as keyword searches.

To start a search, you enter a word or multiple words in the search box. When a single word is entered, a keyword search is performed. You can check this out by typing one word into the form and note the number of results located. Then, repeat the search with a minor change. In front of the search word, type 'kw=' followed by the same search term. The results will be identical.

When you have more than one word in the search box, Koha will still do a keyword search, but a bit differently. Each word will be searched on its own, then the Boolean connector 'and' will narrow your search to those items with all words contained in matching records.

Suppose you want to find material about how libraries are using mashups. You'll select the major words and enter them into the persistent search box.

The response to this search is:

The order of the words does not affect the retrieval results, so you could also enter the search as "mashups library". The response to this search is results

Too many words in the search box will find very few matches, as the following example illustrates:

---

## 11.2.4. Advanced Searching

When you can't find the most appropriate material with a general search, you can move to the Advanced Search page by clicking on the Search option on the persistent toolbar.

The Advanced Search page offers many ways to limit the results of your search. You can search using the Boolean operators AND, OR, and NOT; limit by item type; limit by year and language; limit by subtypes audience, content, format, or additional content types; by location and by availability.

The first limiting section on the Advanced Search page provides a quick and simple way to use the Boolean operators in your search. Note that this display depends on a system preference setting. This option can be found on the Administration > System Preferences > Searching page. The option called [expandedSearchOption](#) must be set to 'show' to see the following display.

In this section you can choose among the many indexes by clicking on the arrow in the first box. The blank box that follows is where you enter your first search term or terms. On the second line, you can choose the Boolean operator you want to use in your search. The options are 'and', 'or', and 'not'. Then, you would again choose the index to search, followed by the second term or terms. If you have more concepts you want to include in your search, you can click the [+] to add another line for your search.

A sample search is shown next, followed by its results:

When you use the Boolean operators to broaden or narrow a search, remember the action of each operator. The 'and' operator narrows the results you'll retrieve because the search will retrieve the records that include all your search terms. The 'or' operator expands the results because the search will look for occurrences of all of your search terms. The 'not' operator excludes records with the term that follows the operator.

Note: If you leave this [expandedSearchOption](#) set to 'don't show', this is the display you will see:

The Advanced Search page then shows the multiple kinds of limits that can be applied to your search results. Either check a box or select from the drop down menus to narrow your search. You will type the year, year range, or a 'greater than (>)' or 'less than (<)' year.

Finally, you can choose how the results will be sorted. The pre-defined sort options are in the final area of the Advanced Search screen. search limits

The default sort is by relevance, although you can choose to sort by author, by title, by call number, by dates, or by popularity. If you would prefer a different default sort, you can set [defaultSortField](#) to one of the other choices in Administration > System Preferences > Searching.

---

## 11.2.5. Common Command Language Searching

Koha uses the Common Command Language (CCL) (ISO 8777) as its internal search protocol. Searches initiated in the graphical interface use this protocol as well, although the searcher doesn't know which indexes, operators and limiters are available and being used to conduct their search. The searcher can use the Advanced Search when more precise results set are desired and where the search indexes are somewhat known. However, some library users and many library staff prefer using a command based structure. This part of the document will present and explain the use of the Koha command based structure. The indexes, operators, and limiters used are identical to those used in the graphical interface.

---

### 11.2.5.1. Indexes

The CCL standard itself doesn't specify a particular set of qualifiers (indexes), but it does suggest a few short-hand notations such as 'ti', 'au', and 'su'. Koha has a default set of indexes; it's possible to customize that set by adding needed indexes based on local requirements. A qualifier (index) maps to a particular use-attribute within the Z39.50 BIB-1 attribute set. The complete Z39.50 Bib-1 Attribute can be viewed at <http://www.loc.gov/z3950/agency/bib1.html>.

The standard Koha set of indexes is a fairly common example of MARC21 indexing rules. The indexes that are defined in Koha are indexes typically used by other integrated library systems. The defined Z39.50 Bib-1 Attribute mapped to the indexes are:

**Table 11-1. Attributes**

Bib-1 Attribute	Qualifier (index)
Personal-name	pn
Corporate-name	cpn
Conference-name	cfn
Title	ti
Title-series	se
Title-uniform	ut
ISBN	nb
ISSN	ns
Local number	sn
Local-classification	cn and callnum
Subject	su, su-to, su-geo, su-ut

Pubdate	yr, pubdate
Date-of-Acquisition	acqdate
Language	ln
Place-of-publication	pl
Abstract	ab
Notes	nt
Record-type	rtype, mc-rtype, mus
Author	au, aut
Subject-person-name	su-na
Any (keyword)	kw
Publisher	pb
Content-type	ctype
Koha-Auth-Number	an
Author-personal-bibliography	aub
Author-in-order	auo

The three lines above with green type are used primarily as limiters. Refer to the Koha Indexing Chart for the MARC21 tags mapped to each Bib-1 Attribute and index combination.

---

#### [11.2.5.1.1. Audience Examples](#)

aud:a Easy  
 aud:cc Juvenile  
 aud:d Young adult  
 aud:e Adult

---

#### [11.2.5.1.2. Contents Examples](#)

fic:1 Fiction  
 fic:0 Non Fiction  
 bio:b Biography  
 mus:j Musical recording  
 mus:l Non musical record

---

#### [11.2.5.2. Search Syntax](#)

In the persistent search box, single words generally retrieve large sets. To narrow a search, you can use multiple words. Koha automatically uses the 'and' Boolean operator to create a set of records matching your input. When you want to narrow the search to an author or a title or a subject or some other specific field or use a Boolean operator, there isn't an obvious way to accomplish that specificity. The library user can, of course, go to the Advanced Search page; however, if you know how to construct a CCL search, you can achieve more specificity while using the persistent search box on any page.

There is a specific order to the CCL search syntax. Although it can be used for simple searches, it is an especially effective way to perform complex searches, as it affords you a great deal of control over your search results. To construct a CCL search, first enter a desired index code, then an equal sign, followed by your search word(s). Following are examples of simple CCL searches.

ti=principles of accounting  
 au=brown joseph  
 su=poetry  
 su-na=Shakespeare  
 kw=marlin

You can refine your search by combining search terms with Boolean operators 'and', 'or', or 'not'. Following are examples of searches using Boolean operators.

ti=principles of accounting and au=brown joseph

su=poetry not su-na=Shakespeare

kw=communication and su=debate

Using specific indexes and Boolean operators are not the only way a search can be refined. You can also refine your search as a phrase when looking for a title, author, or subject. The syntax for this search is *index,phr=search words*.

To illustrate the results of various search types, a search was done for the words 'supreme court'. The results illustrate that the search index and the word order make a difference in search results. Only the results count and the search itself is in these examples. The search executed will always be between the single quotes.

You can also choose to use limiters in your search query. Some common limiters include dates, languages, record types, and item types. In the Advance Search, you can either click a box or key in data to limit your search. You can also apply the same limits with CCL by using the syntax in the following examples. In all

*By Date: su=supreme court and yr,st-numeric=>2000*

When you limit by date, you can use the '>' (greater than), '<' (less than), '=' (equal), or 'yyyy-yyyy' (range) symbols.

*By Item Type: su=nursing and itype:BK*

Each library will have a different set of item types defined in their circulation configuration. When you set up item types, you define a code and a name for each one. The name will appear on the Advance Search page. The code you assigned is used as a CCL search limit, formatted as 'itype:x', where 'x' is the assigned code. The initial set of item types in Koha will usually be edited to reflect your collections, so your item type limiters may be different than the initial ones. The initial item type limiters follow.

itype:BKS Books, Booklets, Workbooks

itype:SR Audio Cassettes, CDs

itype:IR Binders

itype:CF CD-ROMs, DVD-ROMs, General Online Resources

itype:VR DVDs, VHS

itype:KT Kit

itype:AR Models

itype:SER Serials

*By format: su=supreme court not l-format:sr*

The format limiters are derived from a combination of LDR, 006 and 007 positions. The formats that are currently defined are the following.

l-format:ta Regular print

l-format:tb Large print

l-format:fk Braille

l-format:sd CD audio

l-format:ss Cassette recording

l-format:vf VHS tape

l-format:vd DVD video

l-format:co CD software

l-format:cr Website

*By content type: su=supreme court not ctype:l*

The content types are taken from the 008 MARC tag, positions 24-27.

There are two other limiter types that are not described in this document. They are: Audience and Content. The only difference in the syntax of the CCL is the actual limiter. They are reproduced here just in case you would like to use these limiters.

### 11.3. Koha Search Indexes

By default, not all fields are indexed in the Zebra search engine, but most are. Below are the fields that are indexed in Zebra.

Table 11-2. Indexes

Field	Description
001	Control-number
005	Date/time-last-modified
007	Microform-generation:n:range(data,11,1), Material-type,ff7-00:w:range(data,0,1), ff7-01:w:range(data,1,1), ff7-02:w:range(data,2,1), ff7-01-02:w:range(data,0,2)
008	date-entered-on-file:n:range(data,0,5), date-entered-on-file:s:range(data,0,5), pubdate:w:range(data,7,4), pubdate:n:range(data,7,4), pubdate:y:range(data,7,4), pubdate:s:range(data,7,4), pl:w:range(data,15,3), ta:w:range(data,22,1), ff8-23:w:range(data,23,1), ff8-29:w:range(data,29,1), lf:w:range(data,33,1), bio:w:range(data,34,1), ln:n:range(data,35,3), ctype:w:range(data,24,4), Record-source:w:range(data,39,0)
010	LC-card-number, Identifier-standard
011	LC-card-number, Identifier-standard
015	BNB-card-number, BGF-number, Number-db, Number-natl-biblio, Identifier-standard
017	Number-legal-deposit, Identifier-standard
018	Identifier-standard
020\$a	SBN:w, Identifier-standard:w
020	Identifier-standard
022\$a	SSN:w, Identifier-standard:w
022	Identifier-standard
023	Identifier-standard
024\$a	Identifier-other
024	Identifier-standard
025	Identifier-standard
027	Report-number, Identifier-standard
028	Number-music-publisher, Identifier-standard
030	CODEN, Identifier-standard
034	Map-scale
037	Identifier-standard, Stock-number
040	Code-institution, Record-source
041	n
043	Code-geographic
050\$b	LC-call-number:w, LC-call-number:p, LC-call-number:s
050	LC-call-number:w, LC-call-number:p, LC-call-number:s
052	Geographic-class
060	NLM-call-number
070	NAL-call-number
080	JDC-classification
082	Dewey-classification:w, Dewey-classification:s
086	Number-govt-pub
100\$9	Cross-Reference:w, Koha-Auth-Number
100\$a	Author,Author:p, Author:s, Editor, Author-personal-bibliography, Author-personal-bibliography:p, Author-personal-bibliography:s
100	Author, Author-title, Author-name-personal, Name, Name-and-title, Personal-name
110\$9	Koha-Auth-Number
110	Author, Author-title, Author-name-corporate, Name, Name-and-title, Corporate-name
111\$9	Koha-Auth-Number
111	Author, Author-title, Author-name-corporate, Name, Name-and-title, Conference-name
130\$n	Thematic-number
130\$r	Music-key
130\$9	Koha-Auth-Number
130	Title, Title-uniform

210	Title, Title-abbreviated
211	Title, Title-abbreviated
212	Title, Title-other-variant
214	Title, Title-expanded
222	Title, Title-key
240\$r	Music-key
240\$n	Thematic-number
240	Title:w, Title:p, Title-uniform
243\$n	Thematic-number
243\$r	Music-key
243	Title:w, Title:p, Title-collective
245\$a	Title-cover:w, Title-cover:p, Title-cover:s, Title:w, Title:p, Title:s
245\$c	Author, Author-in-order:w, Author-in-order:p, Author-in-order:s
245\$9	Cross-Reference:w, Koha-Auth-Number
245	Title:w, Title:p
246	Title, Title:p, Title-abbreviated, Title-expanded, Title-former
247	Title, Title:p, Title-former, Title-other-variant, Related-periodical
260\$a	pl:w, pl:p
260\$b	Publisher:w, Publisher:p
260\$c	copydate, copydate:s
260	pl
300	Extent:w, Extent:p
400\$a	Name-and-title
400\$t	Author-title, Name-and-title, Title, Title-series
400\$9	Koha-Auth-Number
400	Author, Author-name-personal, Name, Personal-name
410	Author, Corporate-name
410\$a	Name-and-title
410\$t	Author-title, Title, Title-series
410\$9	Koha-Auth-Number
410	Author-name-corporate, Name
411	Author, Conference-name
411\$a	Name-and-title
411\$t	Author-title, Title-series
411	Author-name-corporate, Name
440\$a	Title-series:w, Title-series:p
440\$9	Koha-Auth-Number
440	Title-series:w, Title-series:p, Title, Title-series
490\$a	Title-series:w, Title-series:p
490	Title, Title-series
490\$9	Koha-Auth-Number
500	Note:w, Note:p
502	Material-type
505\$r	Author
505\$t	Title
505	Note:w, Note:p
510	indexed-by
520	Abstract:w, Abstract:p
521\$a	lex:n
526\$c	arl, arl:n
526\$d	arp, arp:n
590	Note:w, Note:p
600\$a	Name-and-title, Name, Personal-name, Subject-name-personal, Subject
600\$t	Name-and-title, Title, Subject
600\$9	Koha-Auth-Number
600	Name, Personal-name, Subject-name-personal, Subject
610\$a	Name-and-title
610\$t	Name-and-title, Title
610\$9	Koha-Auth-Number
610	Name, Subject, Corporate-name
611	Conference-name
611\$a	Name-and-title
611\$t	Name-and-title, Title
611\$9	Koha-Auth-Number
611	Name, Subject
630\$n	Thematic-number

630\$r	Music-key
630\$9	Koha-Auth-Number
630	Subject
650\$9	Koha-Auth-Number
650	Subject, Subject:p
651\$9	Koha-Auth-Number
651	Name-geographic, Subject,Subject:p
652\$9	Koha-Auth-Number
653\$9	Koha-Auth-Number
653	Subject, Subject:p
654\$9	Koha-Auth-Number
654	Subject
655\$9	Koha-Auth-Number
655	Subject
656\$9	Koha-Auth-Number
656	Subject
657\$9	Koha-Auth-Number
657	Subject
690\$9	Koha-Auth-Number
690	Subject, Subject:p
700\$9	Cross-Reference, Koha-Auth-Number
700\$a	Author, Author:p
700\$n	Thematic-number
700\$r	Music-key
700\$t	Author-title, Name-and-title, Title, Title-uniform
700	Author, Author-name-corporate, Author-name-personal, Name, Editor, Personal-name
710	Author, Corporate-name
710\$t	Author-title, Name-and-title, Title, Title-uniform
710\$a	Name-and-title
710\$9	Koha-Auth-Number
710	Author, Name
711\$a	Name-and-title
711\$t	Author-title, Title, Title-uniform
711\$9	Koha-Auth-Number
711	Author-name-corporate, Name, Conference-name
730\$n	Thematic-number
730\$r	Music-key
730\$9	Koha-Auth-Number
730	Title, Title-uniform
740	Title, Title-other-variant
773\$t	Host-item
780\$t	Title
780	Title, Title-former, Related-periodical
785	Related-periodical
800\$a	Name-and-title
800\$t	Author-title, Name-and-title, Title, Title-series
800\$9	Koha-Auth-Number
800	Author, Author-name-personal, Name, Personal-name
810\$a	Name-and-title
810\$t	Author-title, Name-and-title, Title, Title-series
810\$9	Koha-Auth-Number
810	Author, Corporate-name, Author-name-corporate, Name
811\$a	Name-and-title
811\$9	Koha-Auth-Number
811\$t	Author-title, Name-and-title, Title, Title-series
811	Author, Author-name-corporate, Name, Conference-name
830\$9	Koha-Auth-Number
830	Title, Title-series
840	Title, Title-series
999\$c	Local-Number:n, Local-Number:w, Local-Number:s
999\$d	biblioitemnumber:n, biblioitemnumber:w, biblioitemnumber:s
942\$0	totalissues:n, totalissues:s
942\$2	cn-bib-source
942\$6	cn-bib-sort:n, cn-bib-sort:s
942\$c	temtype:w

942\$n	Suppress:w, Suppress:n
942\$h	cn-class
942\$i	cn-item
942\$k	cn-prefix
942\$m	cn-suffix
952\$0	withdrawn:n, withdrawn:w
952\$1	lost, lost:n
952\$2	classification-source
952\$3	materials-specified
952\$4	damaged:n, damaged:w
952\$5	restricted:n, restricted:w
952\$6	cn-sort:n, cn-sort:s
952\$7	notforloan:n, notforloan:w
952\$8	ccode
952\$9	itemnumber:n, itemnumber:s
952\$a	homebranch
952\$b	holdingbranch
952\$c	location
952\$d	Date-of-acquisition, Date-of-acquisition:d, Date-of-acquisition:s
952\$e	acqsource
952\$f	coded-location-qualifier
952\$g	price
952\$j	stack:n, stack:w
952\$l	issues:n, issues:w, issues:s
952\$m	renewals:n, renewals:w
952\$n	reserves:n, reserves:w
952\$o	Local-classification:w, Local-classification:p, Local-classification:s
952\$p	barcode, barcode:n
952\$q	onloan:n, onloan:w
952\$r	datelastseen
952\$s	datelastborrowed
952\$t	copynumber
952\$u	uri:u
952\$v	replacementprice
952\$w	replacementpricedate
952\$y	itype:w
952\$z	Note:w, Note:p

---

## Chapter 12. About Koha

The 'About Koha' area will give you important server information as well as general information about Koha.

---

### [12.1. Server Information](#)

Under the 'Server Information' tab you will find information about the Koha version and the machine you have installed Koha on. This information is very important for debugging problems. When reporting issues to your support provider or to the various other support avenues (mailing lists, chat room, etc), it's always good to give the information from this screen.

---

### [12.2. Perl Modules](#)

In order to take advantage of all of the functionalities of Koha, you will need to keep your Perl modules up to date. The 'Perl Modules' tab will show you all of the modules required by Koha, the version you have installed and whether you need to upgrade certain modules.

Items listed in bold are required by Koha, items highlighted in red are missing completely and items highlighted in yellow simply need to be upgraded.

---

## Chapter 13. SOPAC2 Installation

The following documentation was translated using Google Translate from French to English and may have some language errors.

---

### [13.1. Introduction](#)

This is an installation guide and the connector SOPAC2 Koha. It has been tested on Debian Lenny and Ubuntu Jaunty, with 6.12 and Koha Drupal 3.0.x It does not cover the installation of Koha and Drupal, but SOPAC, its dependencies and the connector.

---

## [13.2. Installation of Locum and Insurge](#)

Locum and Insurge are the two libraries used primarily by SOPAC. They serve as a layer of abstraction to the data. Insurge manages the social aspect (tags, reviews, ratings), while Locum manages the connection to the ILS via the connector. Both libraries use a different database from that of Drupal.

---

### [13.2.1. Dependencies](#)

There are no packages for Debian MDB2 yet, you can install it via pear:

```
# apt-get install php-pear
# pear install MDB2
# pear install MDB2#mysql
```

---

### [13.2.2. Download](#)

Download the Locum and Insurge libraries from SVN:

```
# cd /usr/local/lib
# svn co http://dobby.darienlibrary.org/svn/locum/trunk/ locum
# svn co http://dobby.darienlibrary.org/svn/insurge/trunk/ insurge
```

---

### [13.2.3. Creation of the Database](#)

```
$ mysql -u root
mysql> create database scas;
mysql> grant all privileges on scas.* to scas_user@'localhost' identified by 'scas_pass';
mysql> flush privileges;
mysql> exit
```

---

### [13.2.4. Sync DSN](#)

This file will provide the connection information to a DB libraries:

```
# nano /usr/local/etc/locum_insurge_dsn.php
```

It should contain:

```
<?php
$dsn = 'mysql://scas_user:scas_pass@localhost/scas';
```

---

### [13.2.5. Installation of Insurge](#)

If you customize the name of the database, consider editing the sql file:

```
# nano /usr/local/lib/insurge/sql/scas_insurge.sql
```

Import Insurge:

```
$ mysql -u root -p < /usr/local/lib/insurge/sql/scas_insurge.sql
```

Configure Insurge:

```
# nano /usr/local/lib/insurge/config/insurge.ini
```

The variables in insurge.ini are empty. The default values are too long and cause MySQL errors.

Here is a sample of insurge.ini

```
; This is the Locum configuration file
; General configuration options for your installation of Insurge.
```

```
[insurge_config]
dsn_file = "/usr/local/etc/locum_insurge_dsn.php"
; This is where you configure your repository membership information.
;
; parent_server is the server name of the repository parent server you have been
; told to use.
; group_id = The group ID you have been given by your repository admin.
; These configuration points are OPTIONAL and are only necessary if you are
; participating in a repository relationship.
[repository_info]
parent_server = ""
group_id = ""
group_key = ""
```

---

### [13.2.6. Installation of Locum](#)

The same procedure applies to Locum

```
# nano /usr/local/lib/locum/sql/scas_locum.sql
# mysql < /usr/local/lib/locum/sql/scas_locum.sql
# nano /usr/local/lib/locum/sql/locum_init.sql
# mysql < /usr/local/lib/locum/sql/locum_init.sql
# nano /usr/local/lib/locum/config/locum.ini
# mkdir /usr/local/var
# mkdir /usr/local/var/log
```

Configure the DSN:

```
[locum_config]
dsn_file = "/usr/local/etc/locum_insurge_dsn.php"
```

And the coordinates of your Koha installation:

```
[ils_config]
ils = "koha";
ils_version = "30x"
ils_server = "localhost"
ils_harvest_port = "80"
```

The rest depends on your configuration of Koha.

---

### [13.3. Installation of Koha Connector](#)

Enter the connector Koha from SVN:

```
# cd /usr/local/lib/locum/connectors/
# svn co http://dobby.darienlibrary.org/svn/connectors/koha/ locum_koha_30x
```

---

### [13.4. Harvest Records](#)

Now that the connector is in place, we will be able to launch harvest.php, a tool that will reap Locum DB Koha and fill the locum.

Start by configuring harvest.php:

```
# nano /usr/local/lib/locum/tools/harvest.php
```

Here are the variables you must change:

```
$first_record = 1;
$last_record = 30;
```

These are the minimum and maximum biblionumbers from your Koha install.

Then start the harvest:

```
# chmod +x /usr/local/lib/locum/tools/harvest.php
$ /usr/local/lib/locum/tools/harvest.php
```

---

## [13.5. Installation of Sphinx](#)

Sphinx is the indexer for the database used by Locum and Insurge.

---

### [13.5.1. Dependencies](#)

There is no Debian package for Sphinx so you'll have to compile the source directly:

```
# apt-get install g++ make libmysql++-dev
```

---

### [13.5.2. Download and Compile](#)

```
$ wget http://sphinxsearch.com/downloads/sphinx-0.9.8.tar.gz
$ tar zxvf sphinx-0.9.8.tar.gz
$ cd sphinx-0.9.8
$ ./configure --prefix=/usr/local/sphinx
$ make
$ make install
# mkdir /usr/local/sphinx
# mkdir /usr/local/sphinx/lib
# cp api/sphinxapi.php /usr/local/sphinx/lib/
$ rm -R sphinx-0.9.8*
```

---

### [13.5.3. Creation of User and Group](#)

Creating a Sphinx user and change the owner:

```
# adduser sphinx
# addgroup sphinx
# usermod -G sphinx sphinx
# mkdir /usr/local/sphinx/var/run
# chown -R sphinx.sphinx /usr/local/sphinx/var
```

---

### [13.5.4. The demon Sphinx](#)

Download:

```
# cd /etc/init.d
# wget http://www.thesocialopac.net/sites/thesocialopac.net/files/sphinx
# chmod +x /etc/init.d/sphinx
```

Add Sphinx in the service at boot:

```
# update-rc.d sphinx defaults
```

---

### [13.5.5. Configuration](#)

Copy the configuration file supplied with the source of Sphinx before the change:

```
# cp /usr/local/lib/locum/sphinx/sphinx.conf /usr/local/sphinx/etc/
# sed 's/locum_db_user/scas_user/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile;
mv tmpfile /usr/local/sphinx/etc/sphinx.conf
# sed 's/locum_db_pass/scas_pass/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile; mv tmpfile /usr/local/sphinx/etc/sphinx.conf
```

And if you personalize the name of the BDD:

```
# sed 's/scas/Ma_BDD/g' /usr/local/sphinx/etc/sphinx.conf > tmpfile; mv tmpfile /usr/local/sphinx/etc/sphinx.conf
```

---

### [13.5.6. Indexing documents](#)

Indexing is necessary if you want to use the search features of SOPAC.

You must first complete the Insurge table index

```
# chmod +x /usr/local/lib/insurge/tools/update-index.php
$ /usr/local/lib/insurge/tools/update-index.php
```

Then start indexing Sphinx

```
$ /usr/local/sphinx/bin/indexer --all
```

Finally, we must start the demon:

```
# /etc/init.d/sphinx start
```

When the demon is already en route, you can update the index with:

```
$ /usr/local/sphinx/bin/indexer --all --rotate
```

---

## [13.6. Installation of SOPAC2](#)

Now to the SOPAC software itself:

---

### [13.6.1. Download](#)

Download from SVN:

```
$ cd /chemin/vers/drupal/sites/all/
$ mkdir modules
$ cd modules/
$ svn co http://dobby.darienlibrary.org/svn/sopac/trunk/ sopac
```

---

### [13.6.2. Installation](#)

Going in the administration of Drupal to activate the module. Enable also the dependencies:

Profile

PHP Filter

Path

The Drupal menu should now list these entries.

---

### [13.6.3. Configuration](#)

Then go into the settings of SOPAC.

Configure the paths to the Locum and Insurge libraries

Choose a URL prefix SOPAC, in my "catalog". Create a node with content like:

```
<?php
print sopac_search_form('both');
print theme('pages_catalog');
```

Check the Input Format "PHP Code"

Check Move to front page

In URL path settings, set the SOPAC URL prefix you have chosen.

Go to the root of Drupal, a search form will appear.

Thinking to empty the cache of Drupal when something does not work.

Drupal offers a few blocks, not configured by default. Must specify on which page they should appear.

---

## Appendix A. System Preference Defaults

---

### [A.1. ISBD Defaults](#)

---

#### [A.1.1. MARC Default](#)

#100|{ 100a }{ 100b }{ 100c }{ 100d }{ 110a }{ 110b }{ 110c }{ 110d }{ 110e }{ 110f }{ 110g }{ 130a }{ 130d }{ 130f }{ 130g }{ 130h }{ 130k }{ 130l }{ 130m }{ 130n }{ 130o }{ 130p }{ 130r }{ 130s }{ 130t }|<br/><br/>

#245|{ 245a }{ 245b }{245f }{ 245g }{ 245k }{ 245n }{ 245p }{ 245s }{ 245h }

#246|{ : 246i }{ 246a }{ 246b }{ 246f }{ 246g }{ 246n }{ 246p }{ 246h }

#242|{ = 242a }{ 242b }{ 242n }{ 242p }{ 242h }

#245|{ 245c }

#242|{ = 242c }

#250| - { 250a }{ 250b }

#254|, { 254a }

#255|, { 255a }{ 255b }{ 255c }{ 255d }{ 255e }{ 255f }{ 255g }

#256|, { 256a }

#257|, { 257a }

#258|, { 258a }{ 258b }

#260| - { 260a }{ 260b }{ 260c }

#300| - { 300a }{ 300b }{ 300c }{ 300d }{ 300e }{ 300f }{ 300g }

#306| - { 306a }

#307| - { 307a }{ 307b }

#310| - { 310a }{ 310b }

#321| - { 321a }{ 321b }

#340| - { 3403 }{ 340a }{ 340b }{ 340c }{ 340d }{ 340e }{ 340f }{ 340h }{ 340i }

#342| - { 342a }{ 342b }{ 342c }{ 342d }{ 342e }{ 342f }{ 342g }{ 342h }{ 342i }{ 342j }{ 342k }{ 342l }{ 342m }{ 342n }{ 342o }{ 342p }{ 342q }{ 342r }{ 342s }{ 342t }{ 342u }{ 342v }{ 342w }

#343| - { 343a }{ 343b }{ 343c }{ 343d }{ 343e }{ 343f }{ 343g }{ 343h }{ 343i }

#351| - { 3513 }{ 351a }{ 351b }{ 351c }

#352| - { 352a }{ 352b }{ 352c }{ 352d }{ 352e }{ 352f }{ 352g }{ 352i }{ 352q }

#362| - { 362a }{ 351z }

#440| - { 440a }{ 440n }{ 440p }{ 440v }{ 440x }|.

#490| - { 490a }{ 490v }{ 490x }|.

#800| - { 800a }{ 800b }{ 800c }{ 800d }{ 800e }{ 800f }{ 800g }{ 800h }{ 800j }{ 800k }{ 800l }{ 800m }{ 800n }{ 800o }{ 800p }{ 800q }{ 800r }{ 800s }{ 800t }{ 800u }{ 800v }|.

#810| - |{ 810a }{ 810b }{ 810c }{ 810d }{ 810e }{ 810f }{ 810g }{ 810h }{ 810k }{ 810l }{ 810m }{ 810n }{ 810o }{ 810p }{ 810r }{ 810s }{ 810t }{ 810u }{ 810v }|.  
#811| - |{ 811a }{ 811c }{ 811d }{ 811e }{ 811f }{ 811g }{ 811h }{ 811k }{ 811l }{ 811n }{ 811p }{ 811q }{ 811s }{ 811t }{ 811u }{ 811v }|.  
#830| - |{ 830a }{ 830d }{ 830f }{ 830g }{ 830h }{ 830k }{ 830l }{ 830m }{ 830n }{ 830o }{ 830p }{ 830r }{ 830s }{ 830t }{ 830v }|.  
#500|<br/><br/>|{ 5003 }{ 500a }|  
#501|<br/><br/>|{ 501a }|  
#502|<br/><br/>|{ 502a }|  
#504|<br/><br/>|{ 504a }|  
#505|<br/><br/>|{ 505a }{ 505t }{ 505r }{ 505g }{ 505u }|  
#506|<br/><br/>|{ 5063 }{ 506a }{ 506b }{ 506c }{ 506d }{ 506u }|  
#507|<br/><br/>|{ 507a }{ 507b }|  
#508|<br/><br/>|{ 508a }{ 508a }|  
#510|<br/><br/>|{ 5103 }{ 510a }{ 510x }{ 510c }{ 510b }|  
#511|<br/><br/>|{ 511a }|  
#513|<br/><br/>|{ 513a }{513b }|  
#514|<br/><br/>|{ 514z }{ 514a }{ 514b }{ 514c }{ 514d }{ 514e }{ 514f }{ 514g }{ 514h }{ 514i }{ 514j }{ 514k }{ 514m }{ 514u }|  
#515|<br/><br/>|{ 515a }|  
#516|<br/><br/>|{ 516a }|  
#518|<br/><br/>|{ 5183 }{ 518a }|  
#520|<br/><br/>|{ 5203 }{ 520a }{ 520b }{ 520u }|  
#521|<br/><br/>|{ 5213 }{ 521a }{ 521b }|  
#522|<br/><br/>|{ 522a }|  
#524|<br/><br/>|{ 524a }|  
#525|<br/><br/>|{ 525a }|  
#526|<br/><br/>|{\n510i }{\n510a }{ 510b }{ 510c }{ 510d }{\n510x }|  
#530|<br/><br/>|{\n5063 }{\n506a }{ 506b }{ 506c }{ 506d }{\n506u }|  
#533|<br/><br/>|{\n5333 }{\n533a }{\n533b }{\n533c }{\n533d }{\n533e }{\n533f }{\n533m }{\n533n }|  
#534|<br/><br/>|{\n533p }{\n533a }{\n533b }{\n533c }{\n533d }{\n533e }{\n533f }{\n533m }{\n533n }{\n533t }{\n533x }{\n533z }|  
#535|<br/><br/>|{\n5353 }{\n535a }{\n535b }{\n535c }{\n535d }|  
#538|<br/><br/>|{\n5383 }{\n538a }{\n538i }{\n538u }|  
#540|<br/><br/>|{\n5403 }{\n540a }{ 540b }{ 540c }{ 540d }{\n520u }|  
#544|<br/><br/>|{\n5443 }{\n544a }{\n544b }{\n544c }{\n544d }{\n544e }{\n544n }|  
#545|<br/><br/>|{\n545a }{ 545b }{\n545u }|  
#546|<br/><br/>|{\n5463 }{\n546a }{ 546b }|  
#547|<br/><br/>|{\n547a }|  
#550|<br/><br/>|{ 550a }|  
#552|<br/><br/>|{ 552z }{ 552a }{ 552b }{ 552c }{ 552d }{ 552e }{ 552f }{ 552g }{ 552h }{ 552i }{ 552j }{ 552k }{ 552l }{ 552m }{ 552n }{ 562o }{ 552p }{ 552u }|

#555|<br/><br/>{| 5553 }{ 555a }{ 555b }{ 555c }{ 555d }{ 555u }  
#556|<br/><br/>{| 556a }{ 506z }  
#563|<br/><br/>{| 5633 }{ 563a }{ 563u }  
#565|<br/><br/>{| 5653 }{ 565a }{ 565b }{ 565c }{ 565d }{ 565e }  
#567|<br/><br/>{| 567a }  
#580|<br/><br/>{| 580a }  
#581|<br/><br/>{| 5633 }{ 581a }{ 581z }  
#584|<br/><br/>{| 5843 }{ 584a }{ 584b }  
#585|<br/><br/>{| 5853 }{ 585a }  
#586|<br/><br/>{| 5863 }{ 586a }  
#020|<br/><br/><label>ISBN: </label>{| 020a }{ 020c }  
#022|<br/><br/><label>ISSN: </label>{| 022a }  
#222| = {| 222a }{ 222b }  
#210| = {| 210a }{ 210b }  
#024|<br/><br/><label>Standard No.: </label>{| 024a }{ 024c }{ 024d }{ 0242 }  
#027|<br/><br/><label>Standard Tech. Report. No.: </label>{| 027a }  
#028|<br/><br/><label>Publisher. No.: </label>{| 028a }{ 028b }  
#013|<br/><br/><label>Patent No.: </label>{| 013a }{ 013b }{ 013c }{ 013d }{ 013e }{ 013f }  
#030|<br/><br/><label>CODEN: </label>{| 030a }  
#037|<br/><br/><label>Source: </label>{| 037a }{ 037b }{ 037c }{ 037f }{ 037g }{ 037n }  
#010|<br/><br/><label>LCCN: </label>{| 010a }  
#015|<br/><br/><label>Nat. Bib. No.: </label>{| 015a }{ 0152 }  
#016|<br/><br/><label>Nat. Bib. Agency Control No.: </label>{| 016a }{ 0162 }  
#600|<br/><br/><label>Subjects--Personal Names: </label>{|n6003 }{|n600a }{ 600b }{ 600c }{ 600d }{ 600e }{ 600f }{ 600g }{ 600h }{|--600k }{ 600l }{ 600m }{ 600n }  
{ 600o }{|--600p }{ 600r }{ 600s }{ 600t }{ 600u }{|--600x }{|--600z }{|--600y }{|--600v }  
#610|<br/><br/><label>Subjects--Corporate Names: </label>{|n6103 }{|n610a }{ 610b }{ 610c }{ 610d }{ 610e }{ 610f }{ 610g }{ 610h }{|--610k }{ 610l }{ 610m }{  
610n }{ 610o }{|--610p }{ 610r }{ 610s }{ 610t }{ 610u }{|--610x }{|--610z }{|--610y }{|--610v }  
#611|<br/><br/><label>Subjects--Meeting Names: </label>{|n6113 }{|n611a }{ 611b }{ 611c }{ 611d }{ 611e }{ 611f }{ 611g }{ 611h }{|--611k }{ 611l }{ 611m }{ 611n }  
{ 611o }{|--611p }{ 611r }{ 611s }{ 611t }{ 611u }{|--611x }{|--611z }{|--611y }{|--611v }  
#630|<br/><br/><label>Subjects--Uniform Titles: </label>{|n630a }{ 630b }{ 630c }{ 630d }{ 630e }{ 630f }{ 630g }{ 630h }{|--630k }{ 630l }{ 630m }{ 630n }{ 630o }  
{ |--630p }{ 630r }{ 630s }{ 630t }{|--630x }{|--630z }{|--630y }{|--630v }  
#648|<br/><br/><label>Subjects--Chronological Terms: </label>{|n6483 }{|n648a }{|--648x }{|--648z }{|--648y }{|--648v }  
#650|<br/><br/><label>Subjects--Topical Terms: </label>{|n6503 }{|n650a }{ 650b }{ 650c }{ 650d }{ 650e }{|--650x }{|--650z }{|--650y }{|--650v }  
#651|<br/><br/><label>Subjects--Geographic Terms: </label>{|n6513 }{|n651a }{ 651b }{ 651c }{ 651d }{ 651e }{|--651x }{|--651z }{|--651y }{|--651v }  
#653|<br/><br/><label>Subjects--Index Terms: </label>{| 653a }  
#654|<br/><br/><label>Subjects--Facted Index Terms: </label>{|n6543 }{|n654a }{|--654b }{|--654x }{|--654z }{|--654y }{|--654v }  
#655|<br/><br/><label>Index Terms--Genre/Form: </label>{|n6553 }{|n655a }{|--655b }{|--655x }{|--655z }{|--655y }{|--655v }

#656|<br/><br/><label>Index Terms--Occupation: </label>|{\n6563 }{\n656a}{--656k}{--656x}{--656z}{--656y}{--656v}|

#657|<br/><br/><label>Index Terms--Function: </label>|{\n6573 }{\n657a}{--657x}{--657z}{--657y}{--657v}|

#658|<br/><br/><label>Index Terms--Curriculum Objective: </label>|{\n658a}{--658b}{--658c}{--658d}{--658v}|

#050|<br/><br/><label>LC Class. No.: </label>|{ 050a }{ / 050b }

#082|<br/><br/><label>Dewey Class. No.: </label>|{ 082a }{ / 082b }

#080|<br/><br/><label>Universal Decimal Class. No.: </label>|{ 080a }{ 080x }{ / 080b }

#070|<br/><br/><label>National Agricultural Library Call No.: </label>|{ 070a }{ / 070b }

#060|<br/><br/><label>National Library of Medicine Call No.: </label>|{ 060a }{ / 060b }

#074|<br/><br/><label>GPO Item No.: </label>|{ 074a }

#086|<br/><br/><label>Gov. Doc. Class. No.: </label>|{ 086a }

#088|<br/><br/><label>Report. No.: </label>|{ 088a }

---

### A.1.2. UNIMARC Default

#200|<h2>Title : |{200a}{. 200c}{ : 200e}{200d}{. 200h}{. 200i}|</h2>

#461|<label class="ipt">A part of : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search{&q=461t&idx=tj}">{461t}</a>|
|<label class="ipt">Nâž 461h }v. 461v}{(461d)}<br/>|

#200b|<label class="ipt">Material Designation : </label>| {200b }|<br/>

#101a|<label class="ipt">Language(s): </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search{&q=101a&idx=ln}">{101a}</a>|<br/>

#200f|<label class="ipt">Authors : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search{&q=200f&idx=au}">{200f ; }</a>|<br/>

#200g|<label class="ipt">Co-authors : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search{&q=200g&idx=au}">{200g ; }</a>|<br/>

#210a|<br/><label class="ipt">Place of publication : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=pl&q={210a}">{210a}</a>|<br/>

#210c|<label class="ipt">Publisher : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=pb&q={210c}">{210c ; }</a>|<br/>

#210d|<label class="ipt">Date of publication : </label>|{ 210d}|<br/>

#215|<label class="ipt">Description : </label>|{215a}{ : 215c}{ ; 215d}{ + 215e}|<br/>

#225a|<label class="ipt">Series : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search{&q=225a&idx=se}">{225a ; }</a> |

#225|{| = 225d}{ : 225e}{. 225h}{. 225i}{ / 225f}{. 225x}{ ; 225v}|<br/>

#686|<label>Classification : </label>|{ 686a }|<br/>

#608|<label>Form, Genre : </label>|<a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=su&q={608a}">{ 608a}</a>|<br/><br/>

#200||<label class="ipt">Subjects : </label><br/>|<ul>

#600|<label class="ipt">Person(s) </label><br/>|<li><a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=su&q={600a}">{ 600a}</a></li>|<br/>

#601|<label class="ipt">Organisation(s) </label><br/>|<li><a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=su&q={601a}">{ 601a}</a></li>|<br/>

#606|<label class="ipt">Term(s) </label><br/>|<li><a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=su&q={606a}">{ 606a}</a></li>|<br/>

#607|<label class="ipt">Place(s) </label><br/>|<li><a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=su&q={607a}">{ 607a}</a></li>|<br/>

#610|<label>Keywords</label><br/><li><a href="/cgi-bin/koha/catalogue/search.pl?op=do\_search&idx=su&q={610a}">{ 610a}</a></li>

#200|</ul>

#856|<label class="ipt">Electronic resource : </label><a href="{856u}">click here</a> to go to the external resource<br/>

#010|<label class="ipt">ISBN : </label>{|010a ;}<br/>

#011|<label class="ipt">ISSN : </label>{|011a ;}<br/>

#200|<label class="ipt">Notes : </label><br/><ul>

#300|<li>{300a}</li>

#307|<li>{307a}</li>

#310|<li>{310a}</li>

#326|<li>{326a}</li>

#327|<li>{327a}</li>

#333|<li>Public : {|333a}</li>

#200|</ul>

#330|<label class="ipt">Abstract : </label><br/>

#330|{|330a}<br/>

#200|<br/><h2>Items</h2>

#200|<table><thead><tr><th>Call number</th><th>Copy note</th><th>Fonds</th><th>Genre detail</th><th>Circulation type</th><th>Barcode</th></tr>

#995|<tbody><tr><td> {995k}</td><td> {995u}</td><td> {995y}</td><td>{995e}Â Â </td><td> {995o}</td><td>{995f}</td></tr></tbody></table>

---

## A.2. NoZebraIndexes Default

'title' => '130a,210a,222a,240a,243a,245a,245b,246a,246b,247a,247b,250a,250b,440a,830a',

'author' => '100a,100b,100c,100d,110a,111a,111b,111c,111d,245c,700a,710a,711a,800a,810a,811a',

'isbn' => '020a',

'issn' => '022a',

'lccn' => '010a',

'biblionumber' => '999c',

'itemtype' => '942c',

'publisher' => '260b',

'date' => '260c',

'note' => '500a, 501a,504a,505a,508a,511a,518a,520a,521a,522a,524a,526a,530a,533a,538a,541a,546a,555a,556a,562a,563a,583a,585a,582a',

'subject' => '600\*,610\*,611\*,630\*,650\*,651\*,653\*,654\*,655\*,662\*,690\*',

'dewey' => '082',

'bc' => '952p',

'callnum' => '952o',

'an' => '6009,6109,6119',

## Appendix B. Implementation Checklist

The following guide will walk you through the areas of Koha you need to look at in order to prepare to start using the system.

---

### B.1. Data Migration

Before you can start using Koha you'll need to have some data. This can be done by entering it all by hand, but most people already have their data in electronic format of some sort and just need to reformat it a bit for importing into Koha.

Create a list of libraries and enter their info and codes into [Libraries & Groups](#)

Define your list of [Item Types](#)

Define your patron categories and enter the categories and their codes into [Patron Categories](#)

Enter any additional patron information fields you use in your library in the [Patron Attributes](#)

Requires that you first set the ExtendedPatronAttributes system preference if you have custom fields

Define all of your [Authorized Values](#)

Collection codes

Shelving locations

Item statuses (lost, not for loan, use restrictions)

Plus any others that are needed in your library

Optionally define City/Postal Code combos and Road Types for patron entry

Map your bibliographic data from your legacy system to Koha fields and migrate (remembering to use the collection, shelving, item type and library codes you entered in the above setting areas)

[Map your patron data](#) from your legacy system to the Koha fields and migrate (remembering to use the patron and library codes you defined above)

---

### B.2. Admin Configuration

Most of these preferences won't need to be changed to use your Koha system, but there are a few that you might want to customize.

If your library uses CAS Authentication, you'll want to set the various CAS system preferences

Administration System Preferences

[KohaAdminEmailAddress](#) : This is the email address that will be used by the system in 'from' lines and to send errors to if there is no email set for the branch

[noItemTypelmages](#) : Decide if you want to show item type icons in the staff client and opac

[delimiter](#) : This value will be put in between fields when exporting data from Koha

[virtualshelves](#) : Decide if you want the staff and/or patrons to use lists in Koha

[insecure](#) : If your system is behind a local firewall, you can set it to no require log in for the staff client

[AutoLocation](#) : Require staff to log in to the staff client from a specific IP range

[IndependantBranches](#) : Prevent librarians from editing content that belongs to other branches

Go through the [Log System Preferences](#) and decide which actions you want to keep track of in the logs

---

### B.3. Localization Configuration

Koha is used worldwide and so you need to make sure you set your localization preferences so that options throughout Koha appear properly for your location/language.

Localization/Internationalization System Preferences

[dateformat](#) : Decide how dates are displayed throughout Koha

[opa\\_languages\\_display](#) : Decide if patrons can choose what language the OPAC appears in

[opa\\_languages](#) : Decide which languages the patrons can choose from

[language](#) : Decide which languages appear in the staff client

---

### B.4. Circulation Configuration

Before you start circulating your collection you'll need to set up your rules and preferences for circulation.

Define your [Circulation/Fine rules](#)

Enter the [days your library is closed](#) for fines and due date calculations

Circulation System Preferences

[CircControl](#) : Define whether circ rules are based on item's location, patron's location or transaction location

[useDaysMode](#) : Define how due dates are calculated

[finesCalendar](#) : Define how fines are calculated (for every late date or only for days the library is open)

[SpecifyDueDate](#) : Decide if staff are allowed to override due dates on checkout

[AutomaticItemReturn](#) : Decide if items are sent back to the owning branch when checked in

[todayIssuesDefaultSortOrder](#) : Decide how items checked out today display on the patron record

[previousIssuesDefaultSortOrder](#) : Decide how items checked out prior to today display on the patron record

[noIssuesCharge](#) : Define the maximum amount a patron can owe before checkouts are blocked

[ReturnBeforeExpiry](#) : Decide if patrons need to return items before their accounts expire

[AllowOnShelfHolds](#) : Decide if patrons can place holds on items that are marked as being available

[AllowHoldPolicyOverride](#) : Decide if you want the staff to be able to override the setting for the above at checkout

[AllowHoldsOnDamagedItems](#) : Decide if patrons can place holds on items that are marked as damaged

[AllowHoldPolicyOverride](#) : Decide if you want the staff to be able to override the setting for the above at checkout

[maxreserves](#) : Decide how many items a patron can have on hold at once

[AllowHoldPolicyOverride](#) : Decide if you want the staff to be able to override the setting for the above at checkout

[maxoutstanding](#) : Define the maximum amount a patron can owe before holds are blocked

[AllowHoldPolicyOverride](#) : Decide if you want the staff to be able to override the setting for the above at checkout

[ReservesMaxPickUpDelay](#) : Define the number of days before a hold expires

[WebBasedSelfCheck](#) : Decide if you want to use the built in web-based self-checkout system

[AutoSelfCheckAllowed](#) : Decide if the self-checkout system requires login

ShowPatronImageInWebBasedSelfCheck : Decide if you want patron images to show on the self checkout screen

[AllowNotForLoanOverride](#) : Decide if you want the staff to be able to checkout items marked as "not for loan"

[AllowRenewalLimitOverride](#) : Decide if you want staff to override the limit put on renewals

[RenewalPeriodBase](#) : Decide what date renewals are based on

[finesMode](#) : Switch to "Calculate and Charge" before go live if you charge fines

OverdueNoticeBcc : If you want to receive a copy of every overdue notice sent out, enter your email address here

emailLibrarianWhenHoldIsPlaced : Decide if you want an email every time a hold is placed

ReservesControlBranch : Decide which branch's hold rules are considered first

soundon : Decide if you want to have sounds on for circulation actions

[AllowNotForLoanOverride](#) : Decide if you want staff to be able to override 'not for loan' statuses

[globalDueDate](#) : If you want all your books due on the same date, enter that here

[ceilingDueDate](#) : If you want all books due no later than a specific date (like the end of a semester) enter a date here

OverdueNoticeBcc : If you want to receive a copy of all overdue emails, enter your address here

FilterBeforeOverdueReport : If you have a large amount of overdues, you might want to turn this preference on so as to allow you to filter before results appear

DisplayClearScreenButton : If you have a lot of staff members sharing one circ computer you might want to enable this so that staff can clear the screen in between checkouts to protect patron's privacy

Customize your [Notices](#)

Define your [Overdue Notice Triggers](#)

Set up your cron jobs

Populate [your holds queue](#) (every 1-4 hours)

Decide when holds expire (daily)

[Calculate fines due](#) (daily)

Mark long overdue items as lost (daily)

Decide when the system sends out messages (1-4 hours)

Decide when the system queues overdue notices (daily)

Set up hold notices that didn't send for printing (daily after overdues and message queue)

Decide when the system queues the advanced notice of items due (daily)

---

## **[B.5. Patron Configuration](#)**

You have already imported patron data from your old system, but there are plenty of options available to you regarding patrons and their accounts.

Enter your [staff members as patrons](#)

Define [staff members access permissions](#)

Patron System Preferences

AddPatronLists : Decide how patron categories appear when creating a new patron

[autoMemberNum](#) : Decide if the patrons barcodes are auto-generated or if you enter them yourself

MaxFine : Determine the maximum amount that people can owe in fines

NotifyBorrowerDeparture : Decide when to warn staff that the patron account is about to expire

[intranetreadinghistory](#) : Decide if the staff can see the patron's reading/checkout history

[BorrowerMandatoryField](#) : List fields that you want to appear as mandatory on the patron add/edit form

BorrowersTitles : Add or change the titles for your patrons

[borrowerRelationship](#) : Add or change borrower relationships (child to adult and professional to organization)

AutoEmailPrimaryAddress : Determine if the patrons get an email confirming the creation of their account

[EnhancedMessagingPreferences](#) : Decide if patrons can choose from a series of notices (other than overdues)

[patronimages](#) : Decide if you want to save patron images in your system

ExtendedPatronAttributes : Decide if you want to enable custom patron fields

minPasswordLength : Enter the minimum number of characters you want passwords to have

---

## **[B.6. Cataloging Configuration](#)**

Before you start cataloging in Koha you'll want to set up your preferences and other rules.

Define your cataloging templates aka [MARC Bibliographic Frameworks](#)

Run the MARC Bibliographic Framework Test to be sure your changes are valid

Define any [authorized values](#) you might want to use in cataloging

Set up custom classification sources (if you use something other than the defaults)

Set up [MARC matching rules](#) for importing records from mrc files or z39.50

Set up Koha to Keyword mapping for deciding how to display marc fields to the screen (still in beta - only one field)

Set up the [z39.50 targets](#) you want to search for cataloging (and acquisitions)

Cataloging System Preferences

[URLLinkText](#) : Enter text to display when 856 fields do not have pre-defined labels

hide\_marc : If you are unfamiliar with MARC you can have the MARC fields number hidden

[LabelMARCView](#) : Choose how you want duplicate fields to appear on the editor

[DefaultClassificationSource](#) : Choose which classification source is the default in your library

[advancedMARCEditor](#) : Decide if you need labels to appear on your MARC editor

[marcflavour](#) : Choose your MARC format

[itemcallnumber](#) : Enter which field and subfields to look into for the call number

[MARCOrgCode](#) : Enter your MARC Organizational Code (not the same as your OCLC number)

[autoBarcode](#) : Decide if Koha generates item barcodes for you

[OpacSuppression](#) : Decide if you want to hide items marked as suppressed from the OPAC search results

Set up your cron jobs

Decide when the system checks URLs in catalog records to see if they are still valid

---

## **B.7. Authorities Configuration**

Koha has the ability to keep track of your authority records and how they're linked to your bibliographic records. Before using authorities you should configure several preferences.

Set Authority Frameworks aka templates

Authority System Preferences

[BiblioAddsAuthorities](#) : Decide if Koha creates authorities when cataloging

[dontmerge](#) : Decide if updates to authorities trigger updates to the bibliographic records that link to them

Set up your cron jobs

Choose when the system looks for authorities updates to merge changes into bibliographic records

---

## **B.8. Searching Configuration**

There are several system preferences related to searching, it is not always recommended to make too many changes to these preferences since they are set to get you the most relevant results. If you would like to change the default way that Koha handles searching, view the Searching system preferences tab.

Set up your cron jobs

Decide how often your system rebuilds the search index (4-10 min)

---

## **B.9. OPAC Configuration**

There are a lot of ways you can customize your OPAC in Koha.

Decide how you want your OPAC to look & what content you want on the main page

Create a library branded stylesheet using CSS

Do not edit the default CSS files, instead create a new one, that way the system can always fall back on the original CSS.

Create a custom XSLT stylesheet to change the way search results and bib records appear in the OPAC

OPAC System preferences

[opacuserlogin](#) : Decide if you want to allow patrons to login to the OPAC to access customized functionality (searching will be allowed without logging in)

RequestOnOpac : Decide if patrons can place holds via the OPAC

OPACItemHolds : Decide if patrons can place holds on specific items (instead of just the next available item)

[OpacPasswordChange](#) : Decide if patrons can change their password (don't allow this if you're using LDAP)

OpacRenewalAllowed : Decide if patrons can renew their checked out items via the OPAC

[opacreadinghistory](#) : Decide if patrons can view their reading/checkout history via the OPAC

[reviewson](#) : Decide if you want to allow patrons to comment on bib records via the OPAC

[virtualshelves](#) : Decide if you want patrons to be able to create Lists

[suggestion](#) : Decide if you want patrons to be able to submit purchase suggestions

OPACViewOthersSuggestions : Decide if you want patrons to be able to see purchase suggestions made by other patrons

opacbookbag : Decide if patrons can save items into their cart

AnonSuggestions : Decide if you want non logged in users to be able to make purchase suggestions

OPACXSLTResultsDisplay : Decide if you want to use the XSLT stylesheets on the OPAC search results

OPACXSLTDetailsDisplay : Decide if you want to use the XSLT stylesheets on the bib records in the OPAC

[LibraryName](#) : Enter your library name for display in the <title> tag and on the top of the OPAC

opacsmallimage : Choose a logo to replace the Koha logo

opaccredits : Enter HTML to appear at the bottom of every page in the OPAC

[OpacMainUserBlock](#) : Enter HTML that will appear in the center of the main OPAC page

OpacNav : Enter HTML that will appear to the left on the main OPAC page

opacheader : Enter the HTML that will appear above the search box on the OPAC

Customize your stylesheets:

OPACUserCSS : Enter any additional fields you want to define styles for

opaclayoutstylesheet : Point to a CSS file on your Koha server

opacstylesheet : If you have a custom CSS enter the link to that file

opaccolorstylesheet : Point to a CSS file on your Koha server

OpacHighlightedWords : Decide if you want search terms to be highlighted on the search results

[hidelostitems](#) : Decide if you want to show patrons items you have marked as lost

BiblioDefaultView : Decide what view is the default for bib records on the OPAC

[OPACShelfBrowser](#) : Decide if you want to enable the shelf browse functionality

OPACURLOpenInNewWindow : Decide if URLs clicked in the OPAC are opened in a new window

SearchMyLibraryFirst : If you have a multi-branch system decide if you want patrons to search their library first

OpacAuthorities : Decide if you want patrons to be able to search your authority file

OpacBrowser : Decide if you want patrons to browse your authority file

OPACSearchForTitleIn : Choose which libraries you want patrons to be able to re-run their search in

OpacAddMastheadLibraryPullDown : If you're a multi-branch system you can add a pull down to the search bar for patrons to search which library to search

EnableOpacSearchHistory : Decide if you want the system to keep a search history

Set up your cron jobs

If you have the OpacBrowser preference set decide when you want the contents to rebuild

If you have [custom RSS feeds](#), decide when you want the feed to be populated

---

## **[B.10. Enhanced Content Configuration](#)**

Koha allows you to pull in content from outside sources to enhance your bib records. All of this content can be toggled on and off using the enhanced content system preferences.

FRBR/Editions

If you would like to have your OPAC and/or staff client show an 'Editions' tab on the bib record, you want to enable one or the other FRBR preferences and then either one or both of the ISBN services (XISBN and ThingISBN).

Amazon : This service is free and just requires that you visit <http://aws.amazon.com> to sign up

Using the Amazon preferences you can choose to show different types of content from Amazon. Before choosing which types of content you would like to display you will need to enable Amazon content for the staff client and/or the OPAC.

#### Babelthèque

This is a pay service. Contact Babelthèque to learn how to enable this content in the OPAC.

#### Baker and Taylor

This is a pay service from Baker & Taylor. Contact Baker & Taylor for the information to enter into these preferences.

#### Google

This service is free and does not require registration, simply enable GoogleJackets and you're set to go.

#### LibraryThing

With the exception of ThingISBN, you will need to contact LibraryThing for the information to enter into these preferences

Enabling ThingISBN will help to populate the editions tab on the bib record display if you have enabled FRBR.

#### OCLC

XISBN is used to populate the editions tab on the bib record display if you have enabled FRBR. This service is free for up to 999 queries a day.

#### Syndetics

This is a pay service from Syndetics to add content for your bib records. Contact Syndetics for the information to enter into these preferences.

#### [Tagging](#)

Choose whether or not you want to allow patrons to add tags to records in Koha.

---

## **[B.11. Acquisitions Configuration](#)**

When using acquisitions in Koha you first need to define some defaults.

Set up your funds & budgets

Choose your [default currency](#) and enter others if you order from multiple countries

Enter in your vendor information

Create an [Framework with the code ACQ](#) (if you're going to enter item records at the time of ordering or receiving)

Acquisitions System preferences

AcqCreateItem : Decide if an item record is created during acquisition

CurrencyFormat : Decide how you want monetary amounts to display

gst : Enter your sales tax (if you are billed for tax)

OrderPdfFormat : Decide what format you want your print orders to use

---

## **[B.12. Serials Configuration](#)**

When you use serials there are a few options you can set before hand.

Serials System Preferences

RenewSerialAddsSuggestion : Decide if you want renewing serials to add a suggestion for easy purchasing

RoutingSerials : Decide if you want to route serials around your library

RoutingListAddReserves : Decide if holds are placed on serials when there is a routing list in place

#### Cataloging System Preferences

[StaffSerialIssueDisplayCount](#) : Decide how many of the most recent issues to display in the staff client

[OPACSerialIssueDisplayCount](#) : Decide how many of the most recent issues to display in the OPAC

[SubscriptionHistory](#) : Decide how you want the subscription information to display in the OPAC

---

### **B.13. Planning for Go-Live**

Once you have all of your settings ready, you need to prepare for making your system live:

Decide if you need training by an outside service or if your staff can do the training themselves.

Make sure that there is time for your staff to play with your test system and get comfortable with it

If this is a migration, work with your previous company to extract data right before you go live

Come up with URLs for your new Koha OPAC & Staff Client

Make sure that if you're hosting your own system you have a backup plan

---

## **Appendix C. Handling On Order items and holds**

If you tend to import your MARC records when you have ordered the book (as opposed to when you receive the books), and allow patrons to place holds on those books, you may need to add item records to the \*.mrc file before importing.

The easiest way to import your latest order is to first run your records through [MARCEdit](#). Download your MARC records, saving them to your desktop or some other location you use/will remember. If you have MARCEdit already installed you should simply have to double click on your MARC records, and they will automatically open in MARCEdit.

This tutorial was written with MARCEdit version 5.2.3769.41641 on Windows XP, instructions may be different if your version or operating system is different.

Your original file will automatically be in the input; ensure MarcBreaker is chosen, and then click "Execute"

You will be presented with a summary of the records processed at the bottom of the screen

Click 'Edit Records' to continue on to adding item records

Your screen will be replaced with a larger screen containing the MARC records

Click on Tools > Add/Edit Field

Enter in the Koha specific item info

In the Field box, type 942

In the Field Data box, type \\\$c and the item type code (\\\$cBOOK in this example)

Check the 'Insert last' option

Click 'Add Field'

Enter in the item record data

In the Field box, type 952

In the Field Data box, type \$7ORDERED\_STATUS\$aPERM\_LOC\$bCURR\_LOC\$cSHELVING\_LOCATION\$eSOURCE\_OF\_ACQ\$yITEM\_TYPE

ex. \$7-1\$aCPL\$bCPL\$cNEW\$eBrodart\$yBOOK

In a default install of Koha -1 is the value for the Ordered status

You may want to look at other subfields you would like data in -- for example, changing the collection code to put all the items in the same collection (8), automatically fill in the acquisition date (d), or put in a public note (z).

Be sure you use the \$ to separate subfields; adding each subfield on a separate line will cause that many items to be imported with your MARC record (in the example above, four items, each with one of those subfields corrected)

Make sure you look at the Administration > Authorized Values in Koha to put the correct code into the field

Check the 'Insert last' option

Click 'Add Field'

Close the field editor window

Click on File > Compile into MARC

Choose where to save your file

Now you want to go into your Koha system and follow the instructions for [importing MARC records](#).

Once the item has come in, you will need to go to the item record and individually change the item to have the correct barcode, and manually change the status from Ordered to the blank line in the Not for Loan field.

If you purchase your cataloged item records, you may want to request your vendor put in the information you need into the MARC records for you; that way, you could import the edited-by-the-vendor file, overwriting the current record, automatically replacing the data with what you need.

---

## Appendix D. Configuring Receipt Printers

The following instructions are for specific receipt printers, but can probably be used to help with setup of other brands as well.

---

### [D.1. For Epson TM-T88III \(3\) & TM-T88IV \(4\) Printers](#)

---

#### [D.1.1. In the Print Driver](#)

For these instructions, we are using version 5,0,3,0 of the Epson TM-T88III print driver; the EPSON TM-T88IV version is ReceiptE4. Register at the [EpsonExpert Technical Resource Center website](#) to gain access to the drivers; go to Technical Resources, then choose the printer model from the Printers drop-down list.

Click Start » Printers and Faxes » Right click the receipt printer » Properties:

Advanced Tab, click Printing Defaults button

Layout Tab: Paper size: Roll Paper 80 x 297mm

TM-T88III: Layout Tab: Check Reduce Printing and Fit to Printable Width

TM-T88IV: Check Reduced Size Print; Click OK on the popup window that appears. Fit to Printable Width should be automatically selected.

OK your way out of there.

---

#### [D.1.2. In Firefox](#)

Under File » Page Setup:

Shrink to fit page on Format & Options tab

0,0,0,0 for Margins on Margins & Header/Footer Tab. This makes the receipts use all available space on the paper roll.

Set all Headers/Footers to -blank-. This removes all of the gunk you might normally find on a print from firefox, such as the URL, number of pages, etc.

Click OK

Set the default printer settings in Firefox so you don't see a "Print" dialog:

Go to File -> Print

Set the Printer to the receipt printer.

Click the Advanced (or Properties) button

Layout Tab: Paper size: Roll Paper 80 x 297mm

TM-T88III: Layout Tab: Check Reduce Printing and Fit to Printable Width

TM-T88IV: Check Reduced Size Print; click OK on the popup window that appears. Fit to Printable Width should be automatically selected.

OK your way out, go ahead and print whatever page you are on.

Type about:config, in the address bar. Click "I'll be careful, I promise!" on the warning message.

Type, print.always in Filter.

Look for print.always\_print\_silent.

If the preference is there then set the value to true.

If the preference is not there (and it shouldn't be in most browsers) you have to add the preference.

Right click the preference area and select New -> Boolean

Type print.always\_print\_silent in the dialog box and set the value to True. This sets the print settings in Firefox to always use the same settings and print without showing a dialog box.

Setting the print.always\_print\_silent setting in about:config DISABLES the ability to choose a printer in Firefox.

---

## **D.2. For Epson TM-T88II (2) Printers**

Register at the [EpsonExpert Technical Resource Center website](#) to gain access to the drivers; go to Technical Resources, then choose the printer model from the Printers drop-down list.

---

### **D.2.1. In Firefox**

Under File » Page Setup:

Shrink to fit page on Format & Options tab

0,0,0,0 for Margins on Margins & Header/Footer Tab. This makes the receipts use all available space on the paper roll.

Set all Headers/Footers to -blank-. This removes all of the gunk you might normally find on a print from firefox, such as the URL, number of pages, etc.

Click OK

Set the default printer settings in Firefox so you don't see a "Print" dialog:

Go to File -> Print

Set the Printer to the receipt printer.

Print whatever page you are on.

Type about:config, in the address bar. Click "I'll be careful, I promise!" on the warning message.

Type, print.always in Filter.

Look for, print.always\_print\_silent.

If the preference is there then set the value to true.

If the preference is not there (and it shouldn't be in most browsers) you have to add the preference.

Right click the preference area and select New -> Boolean

Type, print.always\_print\_silent in the dialog box and set the value to True. This sets the print settings in Firefox to always use the same settings and print without showing a dialog box.

Setting the print.always\_print\_silent setting in about:config DISABLES the ability to choose a printer in Firefox.

---

## Appendix E. Sample Notice

Nicole Engard

410 Library Rd.

Philadelphia, PA 19107

Dear Nicole Engard (23529000035726),

According to our records, at the time of this notice, you have items that are overdue. Please return or renew them as soon as possible to avoid increasing late fines.

If you have registered a password with the library, you may use it with your library card number to renew online.

If you believe you have returned the items below please call at and library staff will be happy to help resolve the issue.

The following item(s) are currently overdue:

07/08/2008 Creating drug-free schools and communities : 502326000054 Fox, C. Lynn.

06/27/2008 Eating fractions / 502326000022 McMillan, Bruce.

Sincerely, Library Staff

---

## Appendix F. Using Koha as a Content Management System (CMS)

---

### [F.1. Setup](#)

These are instructions for taking a default install of Koha 3.0 and allowing it to function as a little content management system. This will allow a library to publish an arbitrary number of pages based on a template. This example uses the template for the main opac page, but you could just as well use any template you wish with a bit more editing. This may be appropriate if you have a small library, want to allow librarians to easily add pages, and do not want to support a complete CMS.

Copy /usr/share/koha/opac/cgi-bin/opac/opac-main.pl to /usr/share/koha/opac/cgi-bin/opac/pages.pl (in the same directory)

Edit pages.pl in an editor

At approximately line 32 add:

```
my $cgi = new CGI;
```

At approximately line 36 change this code:

```
template_name =>  
    "opac-main.tmpl",
```

To this code:

```
template_name => "pages.tmpl",
```

At approximately line 54 change this code:

```
$template->param(
    koha_news => $all_koha_news,
    koha_news_count => $koha_news_count
);
```

To this:

```
my $page = "page_" . $cgi->param("p");
$template->param(
    koha_news => $all_koha_news,
    koha_news_count => $koha_news_count,
    local_page => "" .
    C4::Context->preference($page)
);
```

Copy /usr/share/koha/opac/htdocs/opac-tmpl/prog/en/modules/opac-main.tmpl to /usr/share/koha/opac/htdocs/opac-tmpl/prog/en/modules/pages.tmpl

At approximately line 38, change this:

```
<!-- TEMPL_IF NAME="OpacMainUserBlock"
--><div id="opacmainuserblock" class="container"><!--
TEMPL_VAR NAME="OpacMainUserBlock" --></div><!-- /TEMPL_IF
-->
```

To this:

```
<!-- TEMPL_IF NAME="local_page" --><div
id="opacmainuserblock" class="container"><!-- TEMPL_VAR
NAME="local_page" --></div><!-- /TEMPL_IF
-->
```

In system preferences in the staff client, click the button for "New Preference" under "Local Use"

Fill it out as so

Explanation: test page for pages tiny cms

Variable: page\_test

Value: Lorem ipsum

Click the TextArea link (or enter "TextArea" into the input field below it)

variable options (last field): 80|50

In a browser go to <http://youraddress/cgi-bin/koha/pages.pl?p=test> The page should come up with the words "Lorem ipsum" in the main content area of the page. (replace "youraddress" with localhost, 127.0.0.1, or your domain name depending on how you have Apache set up.)

To add more pages simply create a system preference where the title begins with "page\_" followed by any arbitrary letters. You can add any markup you want as the value of the field. Reference the new page by changing the value of the "p" parameter in the URL.

### [F.1.1. Troubleshooting](#)

If you have problems check file permissions on pages.pl and pages.tmpl. They should have the same user and group as other Koha files like opac-main.pl.

### [F.1.2. Bonus Points](#)

Instead of using the address <http://youraddress/cgi-bin/koha/pages.pl?p=test> you can shorten it to <http://youraddress/pages.pl?p=test> Just open up /etc/koha/koha-httpd.conf and add the follow at about line 13:

```
ScriptAlias /pages.pl "/usr/share/koha/opac/cgi-bin/opac/pages.pl"
```

Then restart Apache.

## [F.2. Usage](#)

After setting up Koha as a CMS you can create new pages following these instructions:

---

### **F.2.1. Adding Pages**

To add a new page you need to add a system preference under Local Use.

Get there: More > Administration > Global System Preferences > Local Use

Click 'New Preference'

Enter in a description in the Explanation field

Enter a value that starts with 'page\_' in the Variable field

Enter starting HTML in the Value field

Set the Variable Type to Textarea

Set the Variable options to something like 20|20 for 20 rows and 20 columns

---

### **F.2.2. Viewing your page**

You can view your new page at <http://YOUR-OPAC/cgi-bin/koha/pages.pl?p=PAGENAME> where PAGENAME is the part you entered after 'page\_' in the Variable field.

---

### **F.2.3. Example**

This process can be used to create recommended reading lists within Koha. So once the code changes have been made per the instructions on 'Koha as a CMS' you go through the 'Adding a New Page' instructions above to great a page for 'Recommended Reading Lists'

Next we need to create pages for our various classes (or categories). To do this, return to the 'Adding a New Page' section and create a preference for the first class.

Next you'll want to link your first page to your new second page, go to the page\_recommend preference and click 'Edit.' Now you want to edit the HTML to include a link to your newest page:

---

### **F.2.4. Live Examples**

The Crawford Library at Dallas Christian College is using this method for their recommended reading lists: <http://opac.dallas.edu/>

---

## **Appendix G. Resetting the Koha Database**

These notes on how to reset the database for Koha 3 were derived from the following email thread:

<http://lists.koha.org/pipermail/koha-devel/2009-January/008939.html>

Resetting the database may be useful if you install Koha with the sample data, and then wish to use real data without reinstalling the software.

---

### **G.1. Truncate Tables**

Use your preferred MySQL client to [truncate](#) the following tables:

biblio  
biblioitems  
items  
auth\_header  
sessions  
zebraqueue

---

## [G.2. Reset the Zebra Index](#)

Run the following commands to reset the authorities and biblios Zebra indices.

```
$ zebraidx -c /etc/koha/zebradb/zebra-authorities-dom.cfg -g iso2709 -d authorities init
$ zebraidx -c /etc/koha/zebradb/zebra-biblios.cfg -g iso2709 -d biblios init
```

---

## **Appendix H. Important Links**

---

### [H.1. Koha Related](#)

Report Koha Bugs - <http://bugs.koha.org>

Koha Versioning Control - <http://git.koha-community.org/>

Database Structure - [http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob\\_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD](http://git.koha-community.org/cgi-bin/gitweb.cgi?p=koha.git;a=blob_plain;f=installer/data/mysql/kohastructure.sql;hb=HEAD)

Koha as a CMS - <http://wiki.koha.org/doku.php?id=en:documentation:tutorials:kohaascms>

SIP2 Support - <http://wiki.koha.org/doku.php?id=en:development:sip2>

Kyles's Koha Tools - <http://kylehall.info/index.php/projects/koha-tools/>

---

### [H.2. Cataloging Related](#)

Koha MARC Tutorials - <http://www.pakban.net/brooke/>

Z39.50 Server Search - <http://targettest.indexdata.com/>

Z39.50 Server List - <http://staff.library.mun.ca/staff/toolbox/z3950hosts.htm>

Library of Congress Authorities - <http://authorities.loc.gov/>

MARC Country Codes - <http://www.loc.gov/marc/countries/>

Search the MARC Code List for Organizations - <http://www.loc.gov/marc/organizations/org-search.php>

---

### [H.3. Enhanced Content Related](#)

Amazon Associates - <http://associates.amazon.com>

Amazon Web Services - <http://aws.amazon.com>

WorldCat Affiliate Tools - <http://www.worldcat.org/wcpa/do/AffiliateUserServices?method=initSelfRegister>

XISBN - <http://www.worldcat.org/affiliate/webservices/xisbn/app.jsp>

LibraryThing for Libraries - <http://www.librarything.com/forlibraries>

---

### [H.4. Reports Related](#)

SQL Reports Library - [http://wiki.koha.org/doku.php?id=sql\\_library](http://wiki.koha.org/doku.php?id=sql_library)

Sample reports from NEKLS - <http://www.nexpresslibrary.org/training/reports-training/>

---

### [H.5. Installation Guides](#)

Installing Koha 3 on Ubuntu - <http://www.blazingmoon.org/guides/k3-on-u810-1.html>

**H.6. Misc**

Zotero - <http://zotero.org>

**Appendix I. Koha Embedded Holdings Data**

This table represents the default embedded holdings data in Koha 3.0. This information can be used for migration or importing data purposes

**Table I-1. Koha Embedded Holdings Data**

MARC21 Tag/subfield	Data Element	Description	Notes
952Å±0	Withdrawn status	Default values: 0 = Not withdrawn 1 = Withdrawn	Coded value, matching <a href="#">Authorized Value</a> category ('WITHDRAWN' in default installation)
952Å±1	Lost status	Default values: 0 = Available 1 = Lost 2 = Long Overdue (Lost) 3 = Lost and Paid For 4 = Missing in Inventory 5 = Missing in Hold Queue	It's possible to configure OPAC so that lost items don't display with the <a href="#">hidelostitems</a> system preference. Coded value, matching <a href="#">Authorized Value</a> category ('LOST' in default installation)
952Å±2	Classification	Classification scheme that defines filing rules used for sorting call numbers.	If no classification scheme is entered, the system will use the value entered in the <a href="#">DefaultClassificationSource</a> preference.
952Å±3	Materials specified	Specific issues of serials or multi-part items.	Copy/volume data is stored in 952Å±h and Å±t for display in Normal views. Å±3 isn't displayed anywhere except the MARC view.
952Å±4	Damaged status	Default values: 0 = Not damaged 1 = Damaged	Coded value, matching <a href="#">Authorized Value</a> category ('DAMAGE' in default installation)
952Å±5	Use restrictions	Default values: 0 = No use restrictions 1 = Restricted Access	Coded value, matching <a href="#">Authorized Value</a> category ('RESTRICT' in default installation)
952Å±7	Not for loan	Default values: -1 = Ordered 0 = Available for loans 1 = Not for Loan 2 = Staff Collection	Coded value, matching <a href="#">Authorized Value</a> category ('NOT_LOAN' in default installation)
952Å±8	Collection code	Coded value	Coded value, matching <a href="#">Authorized Value</a> category ('CCODE' in default installation)
952Å±9	Item number	System-generated item number.	Does not display in the item record.
952Å±a	Owning Library	Branch code	Code must be defined in <a href="#">Libraries, Branches and Groups</a>
952Å±b	Holding library (usually the same as 952\$a )	Branch code	Code must be defined in <a href="#">Libraries, Branches and Groups</a>

952Å±c	Shelving location code		Coded value, matching <a href="#">Authorized Value</a> category ('LOC' in default installation)
952Å±d	Date acquired	YYYY-MM-DD	Date formats in the 952 subfields are required to be in the system internal format for data loading and subsequent item editing: YYYY-MM-DD
952Å±e	Source of acquisition	Coded value or vendor string	
952Å±g	Purchase price	Decimal number, no currency symbol	
952Å±h	Serial enumeration caption		
952Å±o	Koha full call number		
952Å±p	Barcode *	Max 20 characters	
952Å±v	Replacement price	Decimal number, no currency symbol	
952Å±w	Price effective from	YYYY-MM-DD	Date formats in the 952 subfields are required to be in the system internal format for data loading and subsequent item editing: YYYY-MM-DD
952Å±y	Koha item type *	Coded value, required field for circulation	Coded value, must be defined in <a href="#">Item types</a>
952Å±z	Public note		

\* - required for circulation

---

## Appendix J. FAQs

---

### [J.1. Display](#)

---

#### [J.1.1. Custom Item Type/Authorized Value Icons](#)

**Question:** Can I have my own set of item type images (or authorized value icons)?

**Answer:** Absolutely. To add additional icons to your system you simply add a new directory to koha-tmpl/intranet-tmpl/prog/img/itemtypeimg/ and to koha-tmpl/opac-tmpl/prog/itemtypeimg and put your icons in the new directory. Your icons will show up in a new tab as soon as they are in the folders.

Remember to put the icons in both places (on the OPAC and the intranet).

---

### [J.2. Circulation](#)

---

#### [J.2.1. Dropbox Date](#)

**Question:** How is the dropbox date is determined? Is it the last open date for the checkout branch? Is it today's date minus one? Can the dropbox checkin date be set?

**Answer:** If the library is closed for four days for renovations, for example, there would be more than one day needed for the dropbox date. You will only have one dropbox date and that will be the last day that the library open (determined by the holiday calendar) because there is no real way to know what day the books were dropped into the box during the 4 closed days. The only way to change the effective checkin date in dropbox mode is to modify the calendar.

---

#### [J.2.2. Duplicate Overdue Notices](#)

**Question:** Why are patrons getting two overdue notices?

**Answer:** This tool takes all branches in the overdue rules and sent notifications to them. So, if you have a default rule & a branch rule, the notification will be generated twice. A quick fix is to discard "default rule" for instance.

---

### [J.3. Cataloging](#)

---

#### [J.3.1. Authority Fields](#)

**Question:** Why can't I edit 1xx, 6xx, or 7xx fields in my catalog record?

**Answer:** These fields are authority controlled and you probably have the BiblioAddsAuthorities set to 'allow'. When it is set to 'don't allow' these fields will be locked and require you to search for an existing authority record.

---

## [J.4. Reports](#)

---

### [J.4.1. Define Codes Stored in DB](#)

---

#### [J.4.1.1. Fines Table](#)

**Question:** What do the codes in the accounttype field in the accountlines table stand for?

**Answer:**

A = acc't management fee

C = credit

F = overdue fine

FOR =forgiven

FU = overdue, still accruing

L = Lost Item

M = Sundry

N = New Card

PAY = payment

W = writeoff

---

#### [J.4.1.2. Statistics Table](#)

**Question:** What are the possible codes for the type field in the statistics table?

**Answer:**

localuse

Registers if an item that had been checked out to a statistics patron (category type = 'X') is returned

issue

return

renew

writeoff

payment

CreditXXX

stores different types of fee credits, so a query to catch them all would include a clause like "type LIKE 'Credit%'"

---

## [J.5. Enhanced Content](#)

---

### [J.5.1. FRBRizing Content](#)

**Question:** At our public library we are running a Koha installation and we've tried to turn on all the nice functionalities in Koha such as the frbrising tool, but do not get the same result as Nelsonville public library.

**Answer:** In fact, this feature is quite tricky to make that right. First it looks at xisbn service. And then search in your database for that isbn. So both xisbn and your internal isbn (in biblio table) have to be normalized. You could therefore use the script misc/batchupdateISBNs.pl (it removes all the - in your local ISBNs)

---

## [J.6. System Administration](#)

---

### [J.6.1. Errors in Zebra Cron](#)

**Question:** I am noticing some errors in the koha-zebradaemon-output.log file. When new records are added it takes a bit longer to index than we think they should. Running rebuild zebra is often faster. Zebra ends up indexing and search works, but I am concerned about the errors. Any ideas?

**Answer:** Rebuild\_zebra.pl -r deletes all of the files in the Zebra db directories (such as reci-0.mf) and then recreates them. Thus, permissions will be lost, and the files will be owned by the user who ran rebuild\_zebra.pl. If one rebuilds the zebra indexes as root, the daemons, which typically run under the user koha, will not be able to update the indexes. Thus, it's important then that the zebra rebuilds are put in the cronjob file of the user koha, and not root. Also important is that other users, such as root, don't manually execute rebuilds.

If one desires that another user be able to execute rebuild\_zebra.pl, he should be given the permission to execute 'sudo -u Koha ../rebuild\_zebra.pl,' (if you want to do this, you also have to edit the sudoers file to pass the PERL5LIB variable with the env\_keep option as by default sudo strips away almost all environment variables). Or, as root user, one can use a simple 'su koha' and then the rebuild\_zebra.pl command.

I've also tried to set the sticky bit on rebuild\_zebra.pl, but for whatever reason it didn't seem to work due to some problem with the PERL5LIB variable that I wasn't able to figure. That seems to me the easiest thing to do, if anybody has any idea how to make it work. If it worked and were the default, I think it would help folks to avoid a great deal of the problems that come up with zebra.

---

### [J.6.2. Making Z39.50 Target Public](#)

**Question:** Could someone tell me the exact steps I need to take to configure Zebra to expose my Koha 3 db as a public Z39.50 service?

**Answer:** Edit the KOHA\_CONF file that your Koha is using. Uncomment the publicserver line like:

```
<!-- <listen id="publicserver" >tcp:@:9999</listen> -->
```

to be:

```
<listen id="publicserver" >tcp:@:9999</listen>
```

Then restart zebasrv and connect on the port specified (9999).

---

### [J.6.3. Shelving Location Authorized Values](#)

**Question:** When editing an item, the new shelving location I created is not showing up by default in the items where I assigned it to.

**Answer:** This is because you created the new shelving location with a code value of 0 (zero) Just FYI the system interprets authorized values of 0 as equaling a null so when you edit a record in cataloging where the authorized value in a field was assigned where the code was 0, the value displays as null in the item editor (or MARC editor) instead of the value the library meant it to be.

---

### [J.6.4. Why do I need Authorized Values?](#)

**Question:** Why would I want to define authorized values for MARC tags?

**Answer:** Authorized Values create a 'controlled vocabulary' for your staff. As an example, let us assume that your Koha installation is used by several libraries, and you use MARC 21. You might want to restrict the 850a MARC subfield to the institution codes for just those libraries. In that case, you could define an authorized values category (perhaps called "INST") and enter the institution codes as the authorized values for that category.

Koha automatically sets up authorized value categories for your item types and branch codes, and you can link these authorized values to MARC subfields when you set up your MARC tag structure.

---

## [J.7. Hardware](#)

---

### [J.7.1. Barcode Scanners](#)

**Question:** What barcode scanners have been known to work with Koha?

**Answer:** The simple rule of thumb is, does it act like a keyboard device?, if so, it will work. (i.e. can you take the scanner, scan a barcode and have it show up in a text editor, if so, it will work.)

The main points to check are that it connects to your PC conveniently (can be USB or "keyboard wedge" which means it connects in line with the keyboard, which is useful with older computers), and that it scans the barcode type that you are using.

It is a good idea to test some 'used' barcodes if you have any, to see whether the scanner can read scuffed or slightly wrinkled ones successfully. Most scanners are capable of reading several barcode types - there are many, and the specification should list the ones it can read. You may need to adjust settings slightly, such as prefix and suffix characters, or whether you want to send an 'enter' character or not.

One more tip - some can be set 'always on' and may come with a stand, some have triggers under the handle, some have buttons on top, some are held like a pen. Think about the staff working with the hardware before choosing, as a button in the wrong place can be very awkward to use.

---

#### [J.7.1.1. Scanners used by Koha libraries](#)

MS9590 VoyagerGS (more here: [http://wiki.koha.org/doku.php?id=en:documentation:barcode\\_scanners:ms9590\\_voyagergs&s\[\]=barcode&s\[\]=scanner](http://wiki.koha.org/doku.php?id=en:documentation:barcode_scanners:ms9590_voyagergs&s[]=barcode&s[]=scanner))

---

#### [J.7.2. Printers](#)

---

##### [J.7.2.1. Printers used by Koha libraries](#)

POS-X receipt printer

Star Micronics printer (exact model unknown) with a generic/plain text driver.

Star SP2000 (Nelsonville)

Star TSP-100 futurePRINT (Geauga)

"I know there have been a lot of questions on receipt printers so I thought I'd pass on my findings. We have been testing the Star TSP-100 futurePRINT. I found this print to be VERY easy to configure for Koha. I was even able to customize the print job by adding our system logo (a .gif) to the top of every receipt. Also with a bitmap created in Paint was able to add a message at the bottom of each receipt with the contact information, hours and website for the library that the materials were checked out at."

Epson TM 88 IIIP thermal receipt printers

Epson TM-T88IV

1x1 labels using a Dymolabelwriter printer

---

##### [J.7.2.2. Braille Support](#)

**Question:** Are there any braille embosser or printer which has inbuilt braille converter and it is accessible with UNIX environment?

**Answer:** You may want to look into BRLTTY ([http://www.emptech.info/product\\_details.php?ID=1232](http://www.emptech.info/product_details.php?ID=1232)).

---

##### [J.7.2.3. Additional Support](#)

[http://wiki.koha.org/doku.php?id=receipt\\_printing&s=printer](http://wiki.koha.org/doku.php?id=receipt_printing&s=printer)

<http://www.nexpresslibrary.org/go-live/configure-your-receipt-printers/>

---

## **Appendix K. Cron Jobs**

---

### [K.1. Cron Jobs](#)

The locations below assume a dev install which puts the crons in misc/, if you have a standard install you may want to look in bin/ for these files if you cannot find them in misc/

---

### [K.1.1. Search](#)

Script path: misc/migration\_tools/rebuild\_zebra.pl

Does: Updates Zebra indexes with recently changed data.

Required by: Zebra

Frequency suggestion: every x minutes, (between 5-15 minutes) depending on performance needs

---

### [K.1.2. Fines](#)

Script path: misc/cronjobs/fines.pl

Required by: [finesMode](#) system preference

Frequency suggestion: nightly

---

### [K.1.3. Circulation](#)

#### [K.1.3.1. Holds Queue](#)

Script path: misc/cronjobs/holds/build\_holds\_queue.pl

Does: Updates holds queue report

Required by: [Holds Queue Report](#)

Frequency suggestion: every 1-4 hours

---

#### [K.1.3.2. Long Overdues](#)

Script path: misc/cronjobs/longoverdue.pl

Does: allows one to specify delays for changing items to different lost statuses, and optionally charge for them.

Required by: Frequency suggestion: nightly

---

### [K.1.4. Notices](#)

#### [K.1.4.1. Message Queue](#)

Script path: misc/cronjobs/process\_message\_queue.pl

Does: processes the message queue to send emails and SMS messages to users. sends outgoing emails to patrons.

Frequency suggestion: nightly

---

#### [K.1.4.2. Advanced Notice](#)

Script path: misc/cronjobs/advance\_notices.pl

Does: prepares "pre-due" notices and "item due" notices for patrons who request them prepares notices for patrons for items just due or coming due soon. requires [EnhancedMessagingPreferences](#) to be on

Frequency suggestion: nightly

This script does not actually send the notices. It queues them in the message queue for later

---

#### [K.1.4.3. Overdue Notice](#)

Script path: misc/cronjobs/overdue\_notices.pl

Does: prepares messages to alert patrons of overdue messages

Frequency suggestion: nightly

This script does not actually send the notices. It queues them in the message queue for later

---

### [K.1.5. In Processing/Book Cart](#)

Script path: misc/cronjobs/cart\_to\_shelf.pl

Does: Updates all items with a location of CART to the item's permanent location.

Required by: NewItemsDefaultLocation, [InProcessingToShelvingCart](#), & [ReturnToShelvingCart](#) system preferences

Frequency suggestion: hourly

---

### [K.1.6. Catalog](#)

#### [K.1.6.1. Check URLs](#)

Script path: misc/cronjobs/check-url.pl

Does: checks URLs in 856u field. Script output can now be formatted in CSV or HTML. The HTML version links directly to MARC biblio record editor.

Frequency suggestion: monthly

---

#### [K.1.6.2. Merge Authorities](#)

Script path: misc/migration\_tools/merge\_authorities.pl

Does: Updates biblio data with changes to authorities records

Required by: [dontmerge](#) system preference

Frequency suggestion: nightly

---

#### [K.1.6.3. Serials Update](#)

Script path: misc/cronjobs/serialsUpdate.pl

Does: checks if there is a "late" issue on active subscriptions, and if there is, the script will set it as late, and add the next one as expected.

Frequency suggestion: nightly

---

### [K.1.7. OPAC](#)

#### [K.1.7.1. RSS Feeds](#)

Script path: misc/cronjobs/rss/rss.pl

Does: Produces an RSS XML document for any SQL query (not used for search results RSS feed)

Frequency suggestion: hourly

---

#### [K.1.7.2. Authorities Browser](#)

Script path: misc/cronjobs/build\_browser\_and\_cloud.pl

Does: Generate content for authorities browse in OPAC

Required by: OpacBrowser system preference

---

### [K.1.8. Deprecated scripts](#)

These should not be run without modification:

Script path: misc/cronjobs/update\_items.pl

Script path:misc/cronjobs/smsoverdues.pl

Script path:misc/cronjobs/notifyMailsOp.pl

Script path:misc/cronjobs/reservefix.pl

Script path:misc/cronjobs/zebraqueue\_start.pl

Script path:misc/cronjobs/j2a.pl

---

## [K.2. Additional Information](#)

<http://wiki.koha.org/doku.php?id=en:development:cronjobs>

---

## **Appendix L. Using the SRU server**

### [L.1. Using the SRU server](#)

Koha implements the Search/Retrieve via URL (SRU) protocol. More information about the protocol itself can be found at <http://www.loc.gov/standards/sru/>. The version implemented is version 1.1.

---

#### [L.1.1. Explain](#)

If you want to have informations about the implementation of SRU on a given server, you should have access to the Explain file using a request to the server without any parameter. Like <http://myserver.com:9999/biblios/The> the response from the server is an xml file that should look like the following and will give you information about the default settings of the SRU server.

```
<zs:explainResponse>
  <zs:version>1.1</zs:version>
  <zs:record>
    <zs:recordSchema>http://explain.z3950.org/dtd/2.0/</zs:recordSchema>
    <zs:recordPacking>xml</zs:recordPacking>
    <zs:recordData>
      <explain xml:base="zebradb/explain-biblios.xml">
        <!--
          try stylesheet url: http://../stylesheet=docpath/sru2.xsl
        -->
      </explain>
    </zs:recordData>
  </zs:record>
  <serverInfo protocol="SRW/SRU/Z39.50">
    <host>biblibre</host>
    <port>9999</port>
    <database>biblios</database>
  </serverInfo>
  <databaseInfo>
    <title lang="en" primary="true">Koha 3 Bibliographic SRU/SRW/Z39.50 server</title>
    <description lang="en" primary="true">Koha 3 Bibliographic Server</description>
    <links>
      <sru>http://biblibre:9999</sru>
    </links>
  </databaseInfo>
  <indexInfo>
    <set name="cql" identifier="info:srw/cql-context-set/1/cql-v1.1">
      <title>CQL Standard Set</title>
    </set>
    <index search="true" scan="true" sort="false">
      <title lang="en">CQL Server Choice</title>
      <map>
        <name set="cql">serverChoice</name>
      </map>
    </indexInfo>
</zs:explainResponse>
```

```

    <map>
      <attr type="1" set="bib1">text</attr>
    </map>
  </index>
<index search="true" scan="true" sort="false">
  <title lang="en">CQL All</title>
  <map>
    <name set="cql">all</name>
  </map>
  <map>
    <attr type="1" set="bib1">text</attr>
  </map>
</index>
<!-- Record ID index -->
<index search="true" scan="true" sort="false">
<title lang="en">Record ID</title>
<map>
<name set="rec">id</name>
</map>
<map>
<attr type="1" set="bib1">rec:id</attr>
<attr type="4" set="bib1">3</attr>
</map>
</index>

```

### [L.1.2. Search](#)

This url : <http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=reefs> is composed of the following elements:

base url of the SRU server : <http://myserver.com:9999/biblios?>

search part with the 3 required parameters : version, operation and query. The parameters within the search part should be of the key=value form, and can be combined with the & character.

One can add optional parameters to the query, for instance maximumRecords indicating the maximum number of records to be returned by the server. So <http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=reefs&maximumRecords=5> will only get the first 5 results from the server.

<http://www.loc.gov/standards/sru/sru1-1archive/search-retrieve-operation.html> gives more details about the search operations and in particular the list of optional parameters for searching.

#### [L.1.2.1. More details about Search](#)

The "operation" key can take two values: scan or searchRetrieve.

If operation=searchRetrieve, then the search key should be query. As in : operation=searchRetrieve&query=reefs

If operation=scan, then the search key should be scanClause. As in : operation=scan&scanClause=reefs

[etc/zebradb/biblios/etc/bib1.att](#) defines Zebra/3950 indexes that exist on your system. For instance you'll see that we have indexes for Subject and for Title: att 21 Subject and att 4 Title respectively.

In the [pqf.properties](#) file located under [etc/zebradb/pqf.properties](#) I see that an access point already uses my Subject index (index.dc.subject = 1=21) while another uses my Title index (index.dc.title = 1=4) I know this is my Subject index because as I've seen just before in my [bib1.att](#) file, it's called with =1=21 in Z3950: so index.dc.subject = 1=21 correctly points to my Subject index. And Title was called with 1=4 so index.dc.title = 1=4 correctly points to my Title index. I can now construct my query just like I would in a search box, just preceding it with the "query" key: query=Subject=reefs and Title=coral searches "reefs" in the subject and "coral" in the title. The full url would be <http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Subject=reefs> and Title=coral If I want to limit the result set to just 5 records, I can do

<http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Subject=reefs> and Title=coral&maximumRecords=5

I can also play with truncate, relations, etc. Those are also defined in my [pqf.properties](#) file. I can see for instance the position properties defined as:

```
position.first          = 3=1 6=1
```

```

# "first in field"
position.any          = 3=3 6=1
# "any position in field"

```

So as an example if I want "coral" to be at the beginning of the title, I can do this query :  
<http://myserver.com:9999/biblios?version=1.1&operation=searchRetrieve&query=Title=coral first>

---

### L.1.3. Retrieve

My search for [http://univ\\_lyon3.bibliotheque.com:9999/biblios?version=1.1&operation=searchRetrieve&query=coral reefs&maximumRecords=1](http://univ_lyon3.bibliotheque.com:9999/biblios?version=1.1&operation=searchRetrieve&query=coral reefs&maximumRecords=1) retrieves just one record. The response looks like this:

```

<zs:searchRetrieveResponse>
<zs:version>1.1</zs:version>
<zs:numberOfRecords>1</zs:numberOfRecords>
<zs:records>
<zs:record>
<zs:recordPacking>xml</zs:recordPacking>
<zs:recordData>
<record xsi:schemaLocation="http://www.loc.gov/MARC21/slim http://www.loc.gov/standards/marcxml/schema/MARC21slim.xsd">
<leader> cam a22 4500</leader>
<datafield tag="010" ind1=" " ind2=" ">
<subfield code="a">2-603-01193-6</subfield>
<subfield code="b">rel.</subfield>
<subfield code="d">159 F</subfield>
</datafield>
<datafield tag="020" ind1=" " ind2=" ">
<subfield code="a">FR</subfield>
<subfield code="b">00065351</subfield>
</datafield>
<datafield tag="101" ind1="1" ind2=" ">
<subfield code="c">ita</subfield>
</datafield>
<datafield tag="105" ind1=" " ind2=" ">
<subfield code="a">a z 00|y|</subfield>
</datafield>
<datafield tag="106" ind1=" " ind2=" ">
<subfield code="a">r</subfield>
</datafield>
<datafield tag="100" ind1=" " ind2=" ">
<subfield code="a">20091130 frey50 </subfield>
</datafield>
<datafield tag="200" ind1="1" ind2=" ">
<subfield code="a">Guide des rÃ©cifs coralliens / A Guide to Coral Reefs</subfield>
<subfield code="b">Texte imprimÃ©</subfield>
<subfield code="e">la faune sous-marine des coraux</subfield>
<subfield code="f">A. et A. Ferrari</subfield>
</datafield>
<datafield tag="210" ind1=" " ind2=" ">
<subfield code="a">Lausanne</subfield>
<subfield code="a">Paris</subfield>
<subfield code="c">Delachaux et NiestlÃ©</subfield>
<subfield code="d">cop. 2000</subfield>
<subfield code="e">impr. en Espagne</subfield>
</datafield>
<datafield tag="215" ind1=" " ind2=" ">
<subfield code="a">287 p.</subfield>
<subfield code="c">ill. en coul., couv. ill. en coul.</subfield>
<subfield code="d">20 cm</subfield>
</datafield>
.....
<idzebra>
<size>4725</size>

```

```
<localnumber>2</localnumber>
<filename>/tmp/nw10BJv9Pk/upd_biblio/exported_records</filename>
</idzebra>
</record>
</zs:recordData>
<zs:recordPosition>1</zs:recordPosition>
</zs:record>
</zs:records>
</zs:searchRetrieveResponse>
```

---

## Appendix M. GNU General Public License version 3

Version 3, 29 June 2007

Copyright © 2007 Free Software Foundation, Inc. <http://fsf.org/>

Everyone is permitted to copy and distribute verbatim copies of this license document, but changing it is not allowed.

### Preamble

The GNU General Public License is a free, copyleft license for software and other kinds of works.

The licenses for most software and other practical works are designed to take away your freedom to share and change the works. By contrast, the GNU General Public License is intended to guarantee your freedom to share and change all versions of a program to make sure it remains free software for all its users. We, the Free Software Foundation, use the GNU General Public License for most of our software; it applies also to any other work released this way by its authors. You can apply it to your programs, too.

When we speak of free software, we are referring to freedom, not price. Our General Public Licenses are designed to make sure that you have the freedom to distribute copies of free software (and charge for them if you wish), that you receive source code or can get it if you want it, that you can change the software or use pieces of it in new free programs, and that you know you can do these things.

To protect your rights, we need to prevent others from denying you these rights or asking you to surrender the rights. Therefore, you have certain responsibilities if you distribute copies of the software, or if you modify it: responsibilities to respect the freedom of others.

For example, if you distribute copies of such a program, whether gratis or for a fee, you must pass on to the recipients the same freedoms that you received. You must make sure that they, too, receive or can get the source code. And you must show them these terms so they know their rights.

Developers that use the GNU GPL protect your rights with two steps: (1) assert copyright on the software, and (2) offer you this License giving you legal permission to copy, distribute and/or modify it.

For the developers' and authors' protection, the GPL clearly explains that there is no warranty for this free software. For both users' and authors' sake, the GPL requires that modified versions be marked as changed, so that their problems will not be attributed erroneously to authors of previous versions.

Some devices are designed to deny users access to install or run modified versions of the software inside them, although the manufacturer can do so. This is fundamentally incompatible with the aim of protecting users' freedom to change the software. The systematic pattern of such abuse occurs in the area of products for individuals to use, which is precisely where it is most unacceptable. Therefore, we have designed this version of the GPL to prohibit the practice for those products. If such problems arise substantially in other domains, we stand ready to extend this provision to those domains in future versions of the GPL, as needed to protect the freedom of users.

Finally, every program is threatened constantly by software patents. States should not allow patents to restrict development and use of software on general-purpose computers, but in those that do, we wish to avoid the special danger that patents applied to a free program could make it effectively proprietary. To prevent this, the GPL assures that patents cannot be used to render the program non-free.

The precise terms and conditions for copying, distribution and modification follow.

## TERMS AND CONDITIONS

### 0. Definitions.

“This License” refers to version 3 of the GNU General Public License.

“Copyright” also means copyright-like laws that apply to other kinds of works, such as semiconductor masks.

The Program refers to any copyrightable work licensed under this License. Each licensee is addressed as you. Licensees and recipients may be individuals or organizations.

To modify a work means to copy from or adapt all or part of the work in a fashion requiring copyright permission, other than the making of an exact copy. The resulting work is called a modified version of the earlier work or a work based on the earlier work.

A covered work means either the unmodified Program or a work based on the Program.

To propagate a work means to do anything with it that, without permission, would make you directly or secondarily liable for infringement under applicable copyright law, except executing it on a computer or modifying a private copy. Propagation includes copying, distribution (with or without modification), making available to the public, and in some countries other activities as well.

To convey a work means any kind of propagation that enables other parties to make or receive copies. Mere interaction with a user through a computer network, with no transfer of a copy, is not conveying.

An interactive user interface displays Appropriate Legal Notices to the extent that it includes a convenient and prominently visible feature that (1) displays an appropriate copyright notice, and (2) tells the user that there is no warranty for the work (except to the extent that warranties are provided), that licensees may convey the work under this License, and how to view a copy of this License. If the interface presents a list of user commands or options, such as a menu, a prominent item in the list meets this criterion.

## 1. Source Code.

The source code for a work means the preferred form of the work for making modifications to it. Object code means any non-source form of a work.

A Standard Interface means an interface that either is an official standard defined by a recognized standards body, or, in the case of interfaces specified for a particular programming language, one that is widely used among developers working in that language.

The System Libraries of an executable work include anything, other than the work as a whole, that (a) is included in the normal form of packaging a Major Component, but which is not part of that Major Component, and (b) serves only to enable use of the work with that Major Component, or to implement a Standard Interface for which an implementation is available to the public in source code form. A Major Component, in this context, means a major essential component (kernel, window system, and so on) of the specific operating system (if any) on which the executable work runs, or a compiler used to produce the work, or an object code interpreter used to run it.

The Corresponding Source for a work in object code form means all the source code needed to generate, install, and (for an executable work) run the object code and to modify the work, including scripts to control those activities. However, it does not include the work's System Libraries, or general-purpose tools or generally available free programs which are used unmodified in performing those activities but which are not part of the work. For example, Corresponding Source includes interface definition files associated with source files for the work, and the source code for shared libraries and dynamically linked subprograms that the work is specifically designed to require, such as by intimate data communication or control flow between those subprograms and other parts of the work.

The Corresponding Source need not include anything that users can regenerate automatically from other parts of the Corresponding Source.

The Corresponding Source for a work in source code form is that same work.

## 2. Basic Permissions.

All rights granted under this License are granted for the term of copyright on the Program, and are irrevocable provided the stated conditions are met. This License explicitly affirms your unlimited permission to run the unmodified Program. The output from running a covered work is covered by this License only if the output, given its content, constitutes a covered work. This License acknowledges your rights of fair use or other equivalent, as provided by copyright law.

You may make, run and propagate covered works that you do not convey, without conditions so long as your license otherwise remains in force. You may convey covered works to others for the sole purpose of having them make modifications exclusively for you, or provide you with facilities for running those works, provided that you comply with the terms of this License in conveying all material for which you do not control copyright. Those thus making or running the covered works for you must do so exclusively on your behalf, under your direction and control, on terms that prohibit them from making any copies of your copyrighted material outside their relationship with you.

Conveying under any other circumstances is permitted solely under the conditions stated below. Sublicensing is not allowed; section 10 makes it unnecessary.

## 3. Protecting Users' Legal Rights From Anti-Circumvention Law.

No covered work shall be deemed part of an effective technological measure under any applicable law fulfilling obligations under article 11 of the WIPO copyright treaty adopted on 20 December 1996, or similar laws prohibiting or restricting circumvention of such measures.

When you convey a covered work, you waive any legal power to forbid circumvention of technological measures to the extent such circumvention is effected by exercising rights under this License with respect to the covered work, and you disclaim any intention to limit operation or modification of the work as a means of enforcing, against the work's users, your or third parties' legal rights to forbid circumvention of technological measures.

## 4. Conveying Verbatim Copies.

You may convey verbatim copies of the Program's source code as you receive it, in any medium, provided that you conspicuously and appropriately publish on each copy an appropriate copyright notice; keep intact all notices stating that this License and any non-permissive terms added in accord with section 7 apply to the code; keep intact all notices of the absence of any warranty; and give all recipients a copy of this License along with the Program.

You may charge any price or no price for each copy that you convey, and you may offer support or warranty protection for a fee.

## 5. Conveying Modified Source Versions.

You may convey a work based on the Program, or the modifications to produce it from the Program, in the form of source code under the terms of section 4, provided that you also meet all of these conditions:

The work must carry prominent notices stating that you modified it, and giving a relevant date.

The work must carry prominent notices stating that it is released under this License and any conditions added under section 7. This requirement modifies the requirement in section 4 to "keep intact all notices".

You must license the entire work, as a whole, under this License to anyone who comes into possession of a copy. This License will therefore apply, along with any applicable section 7 additional terms, to the whole of the work, and all its parts, regardless of how they are packaged. This License gives no permission to license the work in any other way, but it does not invalidate such permission if you have separately received it.

If the work has interactive user interfaces, each must display Appropriate Legal Notices; however, if the Program has interactive interfaces that do not display Appropriate Legal Notices, your work need not make them do so.

A compilation of a covered work with other separate and independent works, which are not by their nature extensions of the covered work, and which are not combined with it such as to form a larger program, in or on a volume of a storage or distribution medium, is called an "aggregate" if the compilation and its resulting copyright are not used to limit the access or legal rights of the compilation's users beyond what the individual works permit. Inclusion of a covered work in an aggregate does not cause this License to apply to the other parts of the aggregate.

## 6. Conveying Non-Source Forms.

You may convey a covered work in object code form under the terms of sections 4 and 5, provided that you also convey the machine-readable Corresponding Source under the terms of this License, in one of these ways:

Convey the object code in, or embodied in, a physical product (including a physical distribution medium), accompanied by the Corresponding Source fixed on a durable physical medium customarily used for software interchange.

Convey the object code in, or embodied in, a physical product (including a physical distribution medium), accompanied by a written offer, valid for at least three years and valid for as long as you offer spare parts or customer support for that product model, to give anyone who possesses the object code either (1) a copy of the Corresponding Source for all the software in the product that is covered by this License, on a durable physical medium customarily used for software interchange, for a price no more than your reasonable cost of physically performing this conveying of source, or (2) access to copy the Corresponding Source from a network server at no charge.

Convey individual copies of the object code with a copy of the written offer to provide the Corresponding Source. This alternative is allowed only occasionally and noncommercially, and only if you received the object code with such an offer, in accord with subsection 6b.

Convey the object code by offering access from a designated place (gratis or for a charge), and offer equivalent access to the Corresponding Source in the same way through the same place at no further charge. You need not require recipients to copy the Corresponding Source along with the object code. If the place to copy the object code is a network server, the Corresponding Source may be on a different server (operated by you or a third party) that supports equivalent copying facilities, provided you maintain clear directions next to the object code saying where to find the Corresponding Source. Regardless of what server hosts the Corresponding Source, you remain obligated to ensure that it is available for as long as needed to satisfy these requirements.

Convey the object code using peer-to-peer transmission, provided you inform other peers where the object code and Corresponding Source of the work are being offered to the general public at no charge under subsection 6d.

A separable portion of the object code, whose source code is excluded from the Corresponding Source as a System Library, need not be included in conveying the object code work.

A "User Product" is either (1) a "consumer product", which means any tangible personal property which is normally used for personal, family, or household purposes, or (2) anything designed or sold for incorporation into a dwelling. In determining whether a product is a consumer product, doubtful cases shall be resolved in favor of coverage. For a particular product received by a particular user, "normally used" refers to a typical or common use of that class of product, regardless of the status of the particular user or of the way in which the particular user actually uses, or expects or is expected to use, the product. A product is a consumer product regardless of whether the product has substantial commercial, industrial or non-consumer uses, unless such uses represent the only significant mode of use of the product.

“Installation Information” for a User Product means any methods, procedures, authorization keys, or other information required to install and execute modified versions of a covered work in that User Product from a modified version of its Corresponding Source. The information must suffice to ensure that the continued functioning of the modified object code is in no case prevented or interfered with solely because modification has been made.

If you convey an object code work under this section in, or with, or specifically for use in, a User Product, and the conveying occurs as part of a transaction in which the right of possession and use of the User Product is transferred to the recipient in perpetuity or for a fixed term (regardless of how the transaction is characterized), the Corresponding Source conveyed under this section must be accompanied by the Installation Information. But this requirement does not apply if neither you nor any third party retains the ability to install modified object code on the User Product (for example, the work has been installed in ROM).

The requirement to provide Installation Information does not include a requirement to continue to provide support service, warranty, or updates for a work that has been modified or installed by the recipient, or for the User Product in which it has been modified or installed. Access to a network may be denied when the modification itself materially and adversely affects the operation of the network or violates the rules and protocols for communication across the network.

Corresponding Source conveyed, and Installation Information provided, in accord with this section must be in a format that is publicly documented (and with an implementation available to the public in source code form), and must require no special password or key for unpacking, reading or copying.

## 7. Additional Terms.

“Additional permissions” are terms that supplement the terms of this License by making exceptions from one or more of its conditions. Additional permissions that are applicable to the entire Program shall be treated as though they were included in this License, to the extent that they are valid under applicable law. If additional permissions apply only to part of the Program, that part may be used separately under those permissions, but the entire Program remains governed by this License without regard to the additional permissions.

When you convey a copy of a covered work, you may at your option remove any additional permissions from that copy, or from any part of it. (Additional permissions may be written to require their own removal in certain cases when you modify the work.) You may place additional permissions on material, added by you to a covered work, for which you have or can give appropriate copyright permission.

Notwithstanding any other provision of this License, for material you add to a covered work, you may (if authorized by the copyright holders of that material) supplement the terms of this License with terms:

Disclaiming warranty or limiting liability differently from the terms of sections 15 and 16 of this License; or

Requiring preservation of specified reasonable legal notices or author attributions in that material or in the Appropriate Legal Notices displayed by works containing it; or

Prohibiting misrepresentation of the origin of that material, or requiring that modified versions of such material be marked in reasonable ways as different from the original version; or

Limiting the use for publicity purposes of names of licensors or authors of the material; or

Declining to grant rights under trademark law for use of some trade names, trademarks, or service marks; or

Requiring indemnification of licensors and authors of that material by anyone who conveys the material (or modified versions of it) with contractual assumptions of liability to the recipient, for any liability that these contractual assumptions directly impose on those licensors and authors.

All other non-permissive additional terms are considered “further restrictions” within the meaning of section 10. If the Program as you received it, or any part of it, contains a notice stating that it is governed by this License along with a term that is a further restriction, you may remove that term. If a license document contains a further restriction but permits relicensing or conveying under this License, you may add to a covered work material governed by the terms of that license document, provided that the further restriction does not survive such relicensing or conveying.

If you add terms to a covered work in accord with this section, you must place, in the relevant source files, a statement of the additional terms that apply to those files, or a notice indicating where to find the applicable terms.

Additional terms, permissive or non-permissive, may be stated in the form of a separately written license, or stated as exceptions; the above requirements apply either way.

## 8. Termination.

You may not propagate or modify a covered work except as expressly provided under this License. Any attempt otherwise to propagate or modify it is void, and will automatically terminate your rights under this License (including any patent licenses granted under the third paragraph of section 11).

However, if you cease all violation of this License, then your license from a particular copyright holder is reinstated (a) provisionally, unless and until the copyright holder explicitly and finally terminates your license, and (b) permanently, if the copyright holder fails to notify you of the violation by some reasonable means prior to 60 days after the cessation.

Moreover, your license from a particular copyright holder is reinstated permanently if the copyright holder notifies you of the violation by some reasonable means, this is the first time you have received notice of violation of this License (for any work) from that copyright holder, and you cure the violation prior to 30 days after

your receipt of the notice.

Termination of your rights under this section does not terminate the licenses of parties who have received copies or rights from you under this License. If your rights have been terminated and not permanently reinstated, you do not qualify to receive new licenses for the same material under section 10.

## **9. Acceptance Not Required for Having Copies.**

You are not required to accept this License in order to receive or run a copy of the Program. Ancillary propagation of a covered work occurring solely as a consequence of using peer-to-peer transmission to receive a copy likewise does not require acceptance. However, nothing other than this License grants you permission to propagate or modify any covered work. These actions infringe copyright if you do not accept this License. Therefore, by modifying or propagating a covered work, you indicate your acceptance of this License to do so.

## **10. Automatic Licensing of Downstream Recipients.**

Each time you convey a covered work, the recipient automatically receives a license from the original licensors, to run, modify and propagate that work, subject to this License. You are not responsible for enforcing compliance by third parties with this License.

An "entity transaction" is a transaction transferring control of an organization, or substantially all assets of one, or subdividing an organization, or merging organizations. If propagation of a covered work results from an entity transaction, each party to that transaction who receives a copy of the work also receives whatever licenses to the work the party's predecessor in interest had or could give under the previous paragraph, plus a right to possession of the Corresponding Source of the work from the predecessor in interest, if the predecessor has it or can get it with reasonable efforts.

You may not impose any further restrictions on the exercise of the rights granted or affirmed under this License. For example, you may not impose a license fee, royalty, or other charge for exercise of rights granted under this License, and you may not initiate litigation (including a cross-claim or counterclaim in a lawsuit) alleging that any patent claim is infringed by making, using, selling, offering for sale, or importing the Program or any portion of it.

## **11. Patents.**

A "contributor" is a copyright holder who authorizes use under this License of the Program or a work on which the Program is based. The work thus licensed is called the contributor's "contributor version".

A contributor's "essential patent claims" are all patent claims owned or controlled by the contributor, whether already acquired or hereafter acquired, that would be infringed by some manner, permitted by this License, of making, using, or selling its contributor version, but do not include claims that would be infringed only as a consequence of further modification of the contributor version. For purposes of this definition, "control" includes the right to grant patent sublicenses in a manner consistent with the requirements of this License.

Each contributor grants you a non-exclusive, worldwide, royalty-free patent license under the contributor's essential patent claims, to make,